Roster Management Process

Amanda Egan

Membership Process and Services

September 2023

Action Required	Deadline	Who May Be Affected
Register and attend one of the upcoming Roster Manager trainings	09/28/2023	Roster Managers
Confirm your Voting Roster Administrator access in Account Manager	10/02/2023	Roster Managers

- 10/02/2023
  - Majority of roster requests will be redirected to Roster Managers
    - Public form for roster updates to be retired and replaced with a link to a public page in the Voting application
    - Roster requests will be directed to Roster Managers and Voting_Support@pjm.com
    - Requests to be added to private groups must go the groups Facilitator/Secretary

- Roster Managers
  - Designated by a Contact Manager in the Membership Management Community to manage company roster information
  - Must have Voting Roster Administrator access associated with user account in Account Manager
  - Can add contacts to the Voting application or request contact updates in Voting application
  - Can add or remove individuals to most committee, subcommittee, and task force rosters
  - Can add one time meeting proxy voters in the event a roster representative is unable to participate in a stakeholder meeting

- Every member company can designate up to four individuals on each committee, subcommittee, and task force roster
- Utilized for voting purposes at all standing committees and sr. task forces
  - Market Implementation Committee (MIC), Operating Committee (OC), Planning Committee (PC), Risk Management Committee (RMC), Markets and Reliability Committee (MRC), and Members Committee (MC)
- Certain groups require special authorization to be placed on roster
  - If you do not see a group listed in the roster form, please contact the group's facilitator/secretary to inquire.

- Contact record MUST exist before an individual can be added to a roster or as a designate voter

- Contact MUST have Voting Read/Write access associated with their user in Account Manager if they are being placed on a standing committee roster or will be participating as a designate voter (for voting purposes)

- If roster is full (4 contacts), individuals MUST be removed BEFORE a new individual can be added

- Rosters should be reviewed frequently to ensure up-to-date information

- [Voting Application](#) (for Roster Managers and Voters)
- [Roster Manager User Guide](#) (for Roster Managers)
- [Voting Application Training Slides](#) (for those who will vote via the application)
- [Membership Management Community](#) (for changes to designated Roster Managers)
- Voting_Support@pjm.com (for assistance as needed)

Presenter:
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Assistance:
[voting_support@pjm.com]

[Roster Management Updates]

Member Hotline

(610) 666 – 8980

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