

## I. Purpose of rosters in PJM stakeholder groups

- **Voting eligibility:** The primary purpose of rosters is to indicate who is eligible to vote on behalf of each PJM Member company for each stakeholder group. Roster representation is required to vote at all Senior Standing Committees, Standing Committees, and Senior Task Forces<sup>i</sup>. Up to four individuals per company may represent a PJM Member at a time for each stakeholder group<sup>ii</sup>.
- **Contact lists:** For non-voting groups, rosters serve as contact lists to help foster collaboration among stakeholders who are active in each stakeholder group. (Rosters are distinct from [email distribution lists](#).<sup>iii</sup>)

## II. Purpose of the Roster Manager role

- **Authority to update rosters:** Roster Managers have the responsibility and authority to add, delete and manage each of their Member company’s roster representatives for all open PJM stakeholder groups. Each PJM Member company may assign up to two Roster Managers at a time.
- **Roster Manager Requirements:** There are two requirements to access the Roster Manager feature in [PJM’s Voting Application](#):
  - 1 | Voting Roster Administrator access: Each Roster Manager must be granted Voting Roster Administrator access by their Company Account Manager (CAM) for their PJM user account in Account Manager
  - 2 | Roster Manager role assignment: Each Roster Manager must be designated as a Roster Manager by their Member company’s Contact Manager or Maintenance Manager in the [Membership Management Community](#)

## III. Roster Manager Functionality

- **Ability to easily manage Member company representatives:** The Roster Manager feature, housed in the [PJM Voting Application](#), is designed to make it easier for PJM Members to manage who is representing their company for voting and stakeholder participation purposes.
- **Roster requests are routed to Roster Managers:** The majority of roster update requests submitted through the [Roster Update Form](#) are directed to Roster Managers for approval.<sup>iv</sup> Roster Managers will receive an email notification for each roster request submitted through the form. Roster Managers may also update their Member company’s rosters without using the form.
- **Roster Manager tab in the Voting Application:** The Roster Manager tab contains several features to allow Roster Managers to manage contact information, approve roster changes, and designate proxy voters on behalf of individuals from their companies.



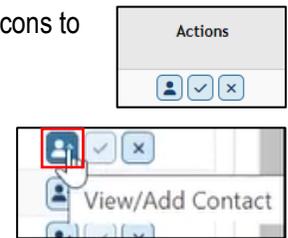
- **Approving roster requests:** After receiving an email notification that a roster request has been submitted, Roster Managers can approve or deny the outstanding roster requests using the following steps:

- 1 | Login to [Voting.PJM.com](http://Voting.PJM.com) and click through the Welcome screen
- 2 | Navigate to the Roster Manager tab in the top left of the page and click the Roster Requests subtab



- 3 | In the Roster Requests subtab, the Action columns on the right side contains icons to approve or deny outstanding roster requests

- **Contacts:** A contact record must exist before an individual can be added to a roster. If a contact record does not exist, click the “View/Add Contact” icon to verify the contact information and click Save. Then all icons will be enabled to approve or deny requests



- **Roster requests that are not acted upon in 30 days will automatically expire.**

- **On-going roster management:** Roster Managers should regularly review their Member company’s roster representatives to ensure voting and stakeholder information is up-to-date for each stakeholder group.

- Roster Managers can update their company’s roster representatives using the following steps without the roster update form:

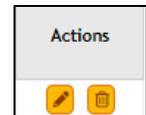
- 1 | Navigate to the Roster Manager tab in Voting Application and click the Roster subtab



- 2 | Review options to create new roster representatives, use Advanced Reporting to review existing roster information, and terminate the roster representation for individuals across multiple stakeholder groups.



- 3 | Individual roster records can be deleted or edited using the icons in the Actions column



## IV. Resources

- Contact [Voting\\_Support@PJM.com](mailto:Voting_Support@PJM.com) for assistance with voting or rosters
- [Roster Manager User Guide](#) for step-by-step instructions for Roster Managers
- [Voting Application Training Slides](#) for eligible voters in the PJM Voting Application
- [Membership Management Community](#) for changes to designated Roster Managers

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<sup>i</sup> Voting groups also include Subcommittees that report directly to the Senior Standing Committees, such as the Governing Document Enhancement & Clarification Subcommittee (GDECS)

<sup>ii</sup> With limited exceptions for certain non-voting and secured PJM stakeholder groups

<sup>iii</sup> Email distribution lists allow users to self-subscribe to communications from individual stakeholder groups regarding meeting notices, materials, tool updates and other reminders for stakeholders

<sup>iv</sup> Requests to be added to secured groups must be approved by the group's Facilitator/Secretary and are processed by PJM's Voting Support team