



# Communities Roadmap

As of November 8, 2021

- Release scheduled for Membership Management Community set for November 3

Product - Action Required	Deadline	Who May Be Affected
Ability to request an upload of bulk contacts/role assignments within Contact Management area of Membership Management Community	<b>November 3</b>	Membership Management Community Users (Contact Managers)
Review upcoming enhancements to Annual Recertification Process	<b>January, 2022</b>	Authorized Representatives, Maintenance Managers, Officers



	2021									2022		
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Member Community				Refresh Go-Live: July 14								
Tech Change Community						Image Update Sept. 22						
Planning Community						Image Update Sept. 22						
Membership Management Community				DOA Updates Production: July 14				Updates Production: Nov. 3		Annual Recertification Updates Production: Jan. 5		

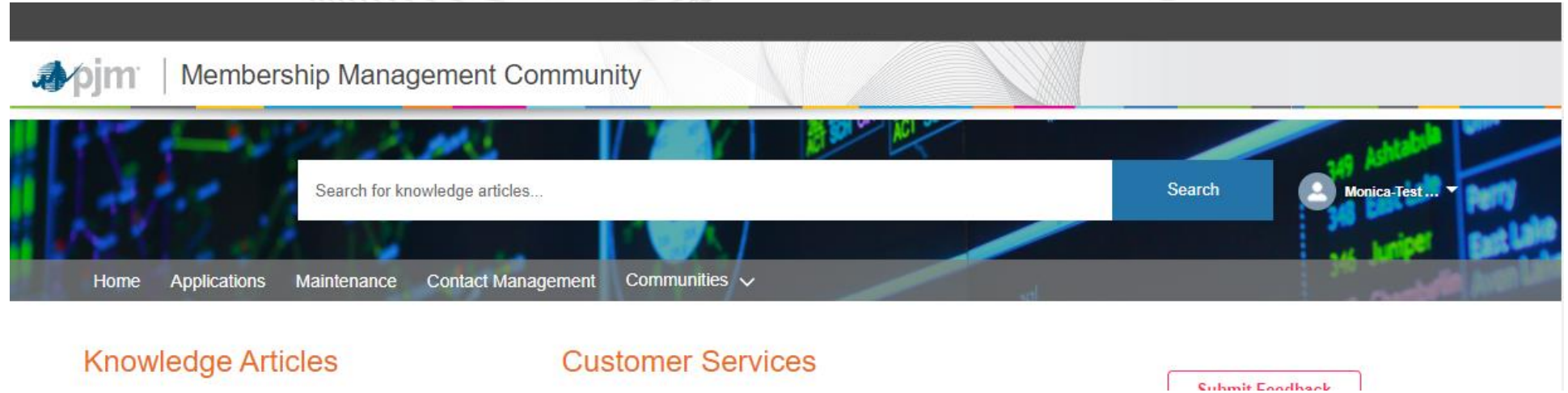
**Legend**

- Start Date
- ◆ End Date

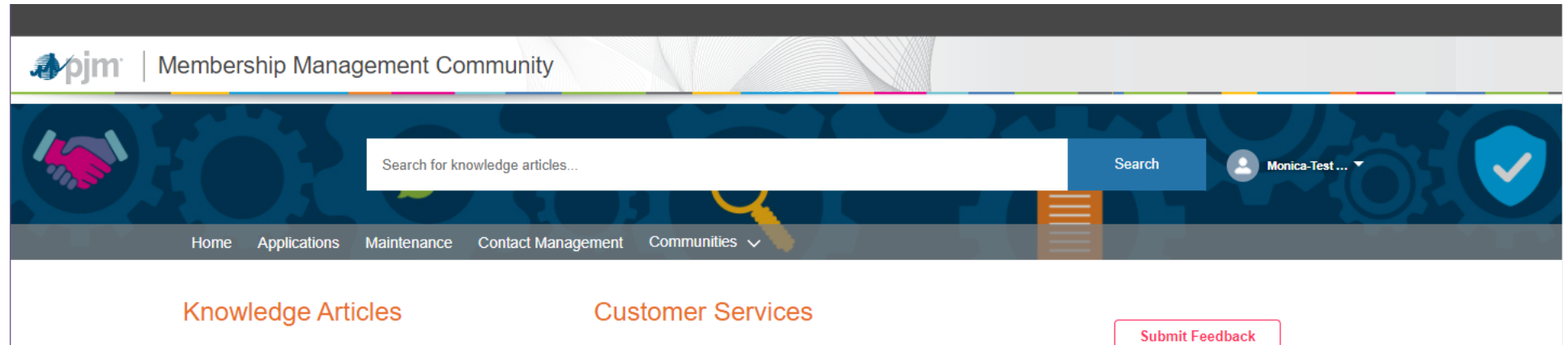


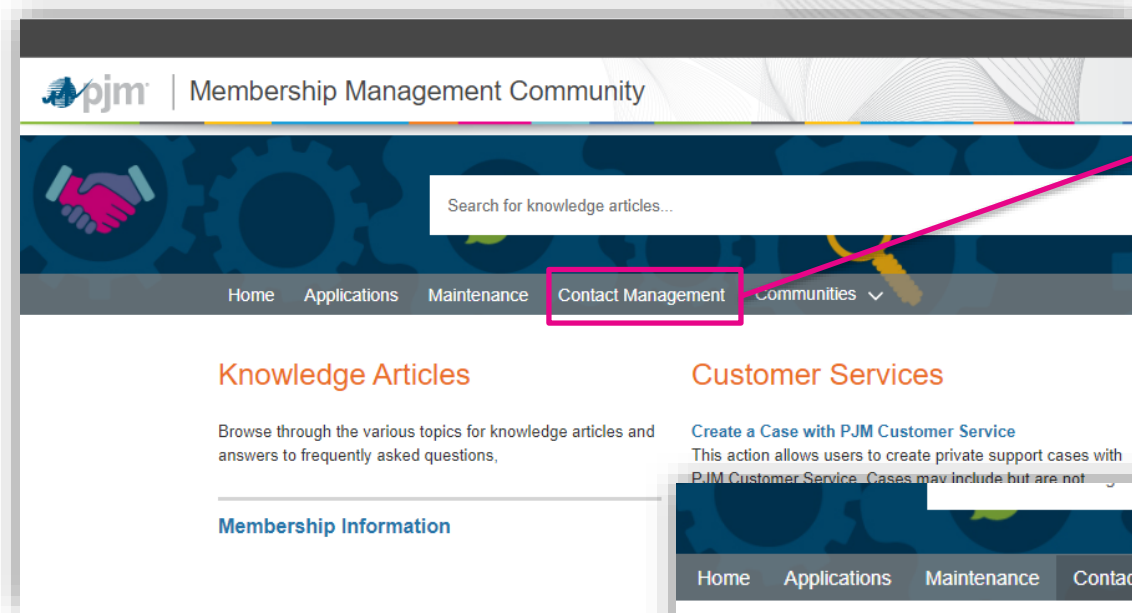
- October v1 Release
  - Updates to main image
  - Ability to request an upload of bulk contacts and role assignments
- Production Go-Live: November 3

- Current



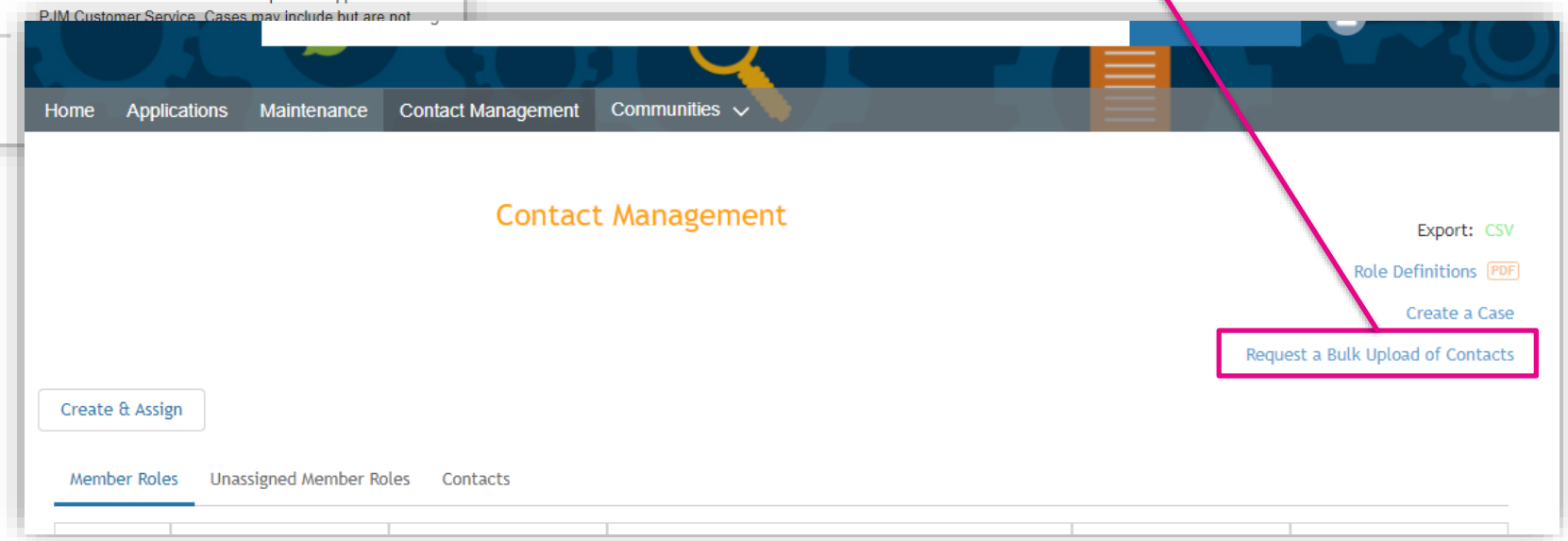
- New





1. Navigate to Contact Management

2. Click Request a Bulk Upload of Contacts link



Home Applications Maintenance Contact Management Communities

## Request a Bulk Upload of Contacts

Members may request to add or remove contacts in bulk by using the respective template noted below. Members are asked to populate the template required (one for additions and one for removals), upload the file, certify, and submit the form. Once received, PJM will review the request and upload the information into the Membership Management Community. The user initiating the request will receive a follow up case comment stating that the bulk upload is complete. Bulk upload requests may take 3-5 business days to complete.

### Bulk Upload of Contacts - Addition

Bulk contacts may be added by using the [Bulk Contact Addition Template](#). The Excel file template must be downloaded and populated with all the column details per company. Contacts representing multiple member companies must be on individual lines with each member company specified.

Or drop files

Accepted file types: .xlsx

### Bulk Upload of Contacts - Removal

Bulk contacts may be removed by using the [Bulk Contact Removal Template](#). The Excel file template must be downloaded and populated with all the column details per company. Contacts being removed from multiple member companies must be on individual lines with each member company specified.

Or drop files

Accepted file types: .xlsx

Exceptions:  
A [Form of Secretary Certificate](#) and [Designation Form](#) must be submitted to add Officers, Authorized Representatives, and Maintenance Managers. The [Designation Form](#) with the Revoke action selected is required to remove Officers, Authorized Representatives, and Maintenance Managers. Contact Managers and Principals can be added or removed in the Maintenance section of the Membership Management Community.

Certify  
 certify the provided information is true correct and complete to the best of my knowledge, information and belief.

3. Choose appropriate template

4. Fill out template according to instructions

5. Upload Excel file to each appropriate requested area (Addition or Removal)

6. Certify data

6. Submit



Area	Recertification Enhancements (January 2022 implementation)
<b>Annual Officer Certification Form</b>	Initiate DocuSign form from Membership Management Community using one of the following options: <ul style="list-style-type: none"> <li>• Send directly to Officer (One recipient)</li> <li>• Send to a designated person to complete and initial before sending to Officer for review and signature (Two recipients)</li> <li>• Print, save, email capabilities documented in FAQ/quick guide</li> </ul>
<b>Principals</b>	<ul style="list-style-type: none"> <li>• Community page redesign to improve editing and data entry functionality</li> <li>• Designate type of Principal (CEO, CFO, CRO, etc.)               <ul style="list-style-type: none"> <li>• Market Participants required to provide type for all previously designated and new Principals</li> </ul> </li> </ul>

- Additional communications will be provided at the MC Webinar.
- Contact PJM at [membershipforms@pjm.com](mailto:membershipforms@pjm.com) if you would like to participate as a pilot user to test new functionality.
  - Upcoming pilot: Officer Certification Form Enhancements
- Demonstration: December Tech Change Forum
- Production Go-Live: January 5, 2022

Facilitator:

Foluso Afelumo, [Foluso.Afelumo@pjm.com](mailto:Foluso.Afelumo@pjm.com)

Secretary:

Risa Holland, [Risa.Holland@pjm.com](mailto:Risa.Holland@pjm.com)

SME/Presenter:

Monica Burkett, [Monica.Burkett@pjm.com](mailto:Monica.Burkett@pjm.com)

## Communities



## Member Hotline

(610) 666 – 8980

(866) 400 – 8980

[custsvc@pjm.com](mailto:custsvc@pjm.com)



# Product Details

The [Member Community](#) allows members to find answers to their questions, get the information they need when they need it, and resolve issues quickly and efficiently.

## Key Product Features

- Research topics quickly and easily
- Submit questions, issues and requests to PJM
- Track the real-time status of your requests
- Initiate various processes for demand bid, generation transfers, etc.

The [Tech Change Community](#) allows users to find information and collaborate with other users and PJM subject matter experts about PJM's tools and initiatives. Discussions are based on topics covered within the monthly Tech Change Forum meetings.

## Key Product Features

- Moderated discussion boards
- Research topics quickly and easily
- Submit questions, issues and requests to PJM

The [Planning Community](#) will allow Transmission and Generation Owners to find information and collaborate with other users and PJM subject matter experts about Planning initiatives, proposal windows and process questions. Discussions are based on Planning topics.

## Key Product Features

- Moderated discussion boards
- Research topics quickly and easily
- Submit questions, issues and requests to PJM

The [Membership Management Community](#) will allow companies to submit application information for PJM membership and maintain member level contact information.

## Key Product Features

- **My Membership**
  - Track the real-time status of your membership application
  - Submit documentation for application
- **Contact Management**
  - Maintain member level contact information for certain roles identified by PJM
- **Maintenance**
  - Track the real-time status of your membership requests
  - Initiate membership related requests such as name change, withdrawal, etc. via the community
  - Complete membership recertification tasks