



# Manual 33: Administrative Services for the PJM Interconnection Operating Agreement – Review and Feedback Session

Special Session of MRC  
Knowledge Management Session  
01/30/2020

- Proposed updates to Manual 33
  - Document existing processes
    - Annual recertification
    - Name change requests
    - Withdrawal requests
    - Contact Manager updates
    - CAM updates
    - Account requests
    - CAM Roles and Responsibilities
  - Identify and address gaps
  - Ensure that the documented requirements are consistent with the obligations under Operating Agreement, section 11.3.1 (a)

- Review of current process and documentation
  - M33
  - User guide/training material
  - Emails to stakeholders re: recertification
  - OA review
- Informational updates on enhancements: November OC, MIC, PC and TCF
- Informal feedback session in November with small group of Member CAMs and Committee Reps

## Membership Management Community

### Applications 2018

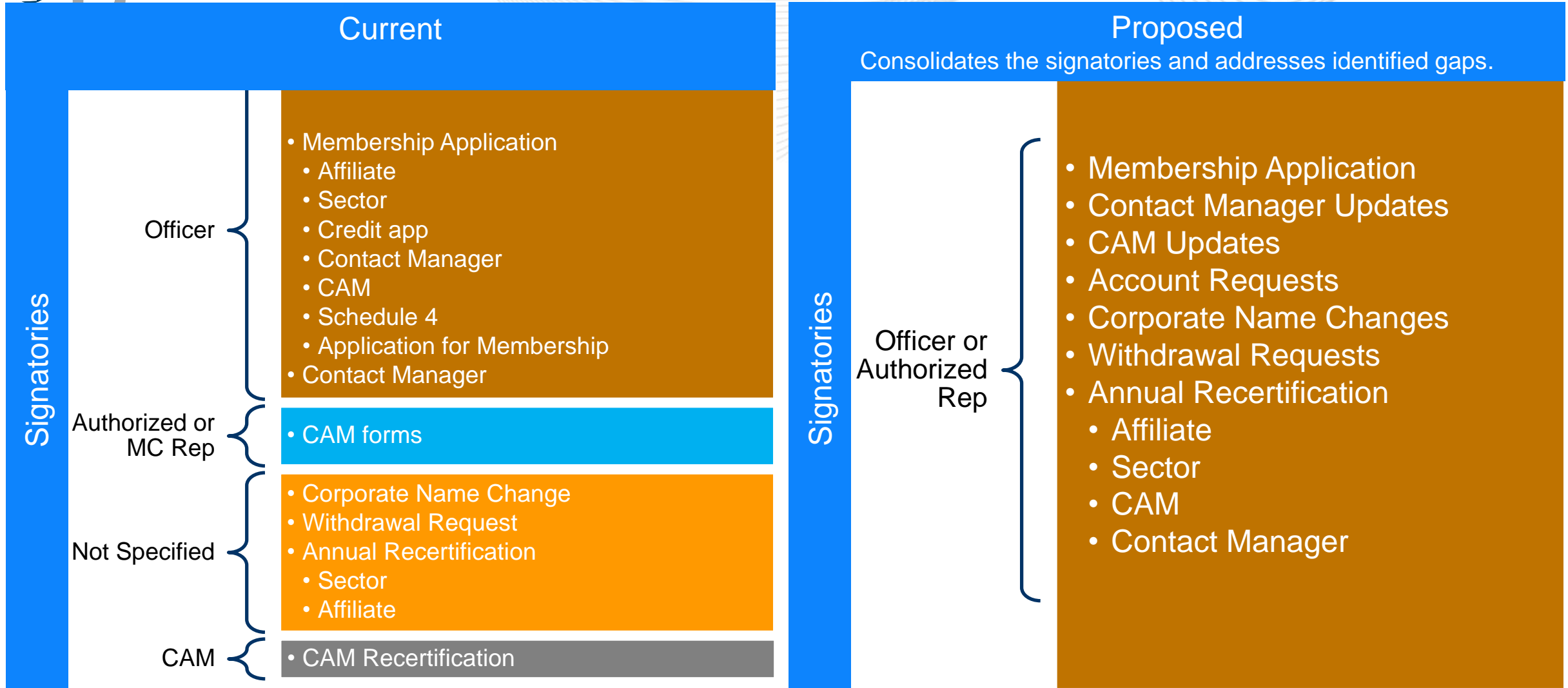
- Enrollment form
- Affiliate disclosure
- Sector selection
- Credit application
- Credit contacts
- DocuSign packet
  - Officer Certification
  - CAM forms
  - Schedule 4
  - Application for membership
  - Contact Manager

### Contact Management 2018

- Audit
- Authorized Rep
- Billing/Credit/Treasury
- Communications
- Compliance
- Legal
- IT
- Officer
- Officer Certification
- Service Agreement Rep

### Member Maintenance 2020

- Annual Recertification
  - Affiliate information
  - Sector selection
  - CAM
  - Contact Manager
  - Related Parties
- Name change
- Withdrawal
- Affiliate information
- CAM/Account requests
- Contact Manager



## January

- 1/23 – MRC 1<sup>st</sup> Read M33
- 1/31 – Sec. Cert. and Designation forms Due

## February

- 2/1 – User set up for Maintenance
- 2/10 – Training sessions on Maintenance (ONGOING)
- 2/20 – MRC Endorsement M33

## March

- 3/16 – Annual Recertification opens
- 3/17 – Open house WebEx sessions to answer questions on Recertification process (ONGOING)

## April

- 4/30 – Annual Recertification closes

## May

- 5/1 – Member data updated based on recerts (ONGOING)
- 5/1 – Internal and external consult for non completion of Annual Recertification
- 5/1 – CAM User Recertification training (ONGOING)

## June

- 6/1 – CAM User Recertification opens
- 6/1 – Open house WebEx sessions to answer questions on Recertification process (ONGOING)

## July

- 7/31 – CAM User Recertification closes