

Industry Tip

Ability to Submit Permit Expenditure Amounts Through IRIS

Date	Module/Application/Functionality	Notes
December 2, 2021	Petroleum Tenure Module	Initial Release

Background

Permittees and Confidential Designated Representatives (CDR) of a permit will now be able to submit their Annual Estimate and Actual Permit Expenditure Amounts, along with supporting Work Expenditure documentation through IRIS. This new feature will apply to:

- PNG Special Exploratory Permits,
- Oil Shale Special Exploratory Permits,
- Oil Sands Special Exploratory Permits and
- Helium Special Exploratory Permits

After December 2, 2021, the ER Service Desk will redirect all Business Associates wanting to submit Estimate and Actual Expenditure amounts to this Industry Tip for detailed instructions on how to use IRIS to make submissions. This change in process has not resulted in any change to the Estimate and Actual Expenditure submission due dates. They continue to be regulated and enforced as per ***The Oil and Gas Tenure Registry Regulations being Chapter C-50.2 Reg 31.***

New IRIS Permission

In order to use this new feature, please contact your System Administrator to apply a new permission set **I.PETT.Disposition.Obligations.Maintain** to your IRIS account.

How to Submit Permit Expenditure Amounts

With the new permission set I.PETT.Disposition.Obligations.Maintain added to your IRIS account you can perform the following steps to submit an Expenditure amount:

1. Log into IRIS.
2. Go to Quick Search > Dispositions.
3. On the Disposition Search screen, enter the Disposition ID of the permit you wish to report on.

Dispositions Search

▼ Search Criteria

Disposition ID

Disposition Lessee ID Search...

Confidential Designated Representative ID Search...

Disposition Type

Land Location Legal Land Description

Legal Land Description E.g. 12-24-015-04W2

Disposition Status Active

Disposition Status Qualifier

****NOTE:** To request reports for multiple dispositions at a time please click [here](#)

4. Click on the Search button.
5. Click on the View Details button in the disposition search results.
6. Click on the Obligations Tab;

Disposition ID

Disposition Status Active

Disposition Type

Status Reason

General Instruments **Obligations** Groupings Well Completion

Expenditure Obligation Rates per Term

Obligation Year	Annual Expenditure Amount/Ha	Comments
2013 - 2014	\$0.50	
2014 - 2015	\$0.50	
2015 - 2016	\$1.00	
2016 - 2017	\$1.50	
2017 - 2018	\$1.50	

7. Scroll down to the Obligations History section on the screen and then click on the Blue Edit Pencil button for the Obligation Year you wish to report on;

Obligations History

	Obligation Year	Notifications	Annual Expendi Amount
	2013 - 2014		▶ \$10,000.00
	2014 - 2015		▶ \$10,000.00

8. An Edit Work Commitment Expense Entries screen will be displayed.

Estimate Expense Type

9. Enter the dollar value of Estimate Expenditures into the Submitted Expense Amount field.
10. Click on the Save button. Please note once an Estimate Expenditure Amount has been saved, it cannot be changed or resubmitted. Do not click on the Submit Actual button when submitting Estimate Expenditures;

Edit Work Commitment Expense Entries

Details Attachments History

Reporting Period From Date: 2020-11-15 Reporting Period To Date: 2021-11-15
 Current Hectares: 8806.523 Submission Date: N/A

Expense Type *	Expense Category	Reference No.	Submitted Expense Amount	Approved Expense Amount	Denied Expense Amount	Comments
Estimate			\$0.00			
Total Amounts			\$0.00	\$0.00	\$0.00	

Discard Changes **Save** Submit Actual

Actual Expense Type

11. For an Actual expense type click the Add a Row button on the Edit Work Commitment Expense Entries screen. This will add an Actual reporting row.

Edit Work Commitment Expense Entries

Details Attachments History

Reporting Period From Date: 2021-11-15 Reporting Period To Date: 2022-11-15
 Current Hectares: 8806.523 Submission Date: N/A

Expense Type *	Expense Category	Reference No.	Submitted Expense Amount	Approved Expense Amount	Denied Expense Amount	Comments
Estimate			3000.00			
Total Amounts			\$0.00	\$0.00	\$0.00	

Add a row Discard Changes Save Submit Actual

12. An Expense Category of Drilling or Exploratory must be selected for each row. Click the drop down to select the Expense Category (Drilling or Exploratory). Enter the dollar value of Actual Expenditures into the Submitted Expense Amount field. To add additional Actual Expense Types, click the Add a row;

The screenshot shows the 'Edit Work Commitment Expense Entries' window. At the top, there are tabs for 'Details', 'Attachments', and 'History'. Below the tabs, there are input fields for 'Reporting Period From Date' (2021-11-15), 'Reporting Period To Date' (2022-11-15), 'Current Hectares' (8806.523), and 'Submission Date' (N/A). The main table has the following columns: Expense Type, Expense Category, Reference No., Submitted Expense Amount, Approved Expense Amount, Denied Expense Amount, and Comments. The 'Submitted Expense Amount' column is highlighted in red for the 'Actual' rows. The 'Expense Category' column is also highlighted in red for the 'Actual' rows. The 'Total Amounts' row shows Submitted Expense Amount of \$0.00, Approved Expense Amount of \$0.00, and Denied Expense Amount of \$0.00. At the bottom, there are buttons for 'Discard Changes', 'Save', and 'Submit Actual'.

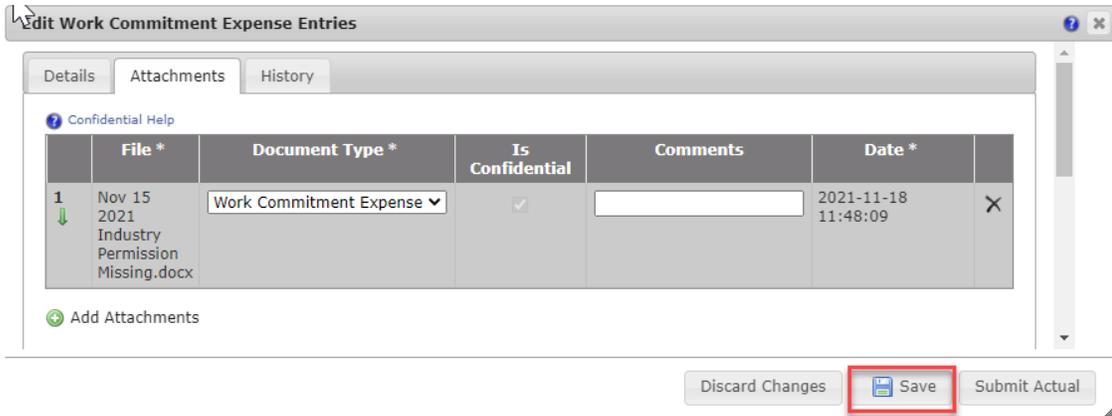
Expense Type *	Expense Category	Reference No.	Submitted Expense Amount	Approved Expense Amount	Denied Expense Amount	Comments
Estimate			3000.00			
Actual	Drilling		\$0.00			
Actual	Exploratory		\$0.00			
Total Amounts			\$0.00	\$0.00	\$0.00	

13. A Work Commitment Expense document must be attached before the data can be Saved as Draft or Submitted. Supporting Documentation can optionally be attached. This includes documentation required as per the Oil and Gas Tenure Registry Regulations Appendix Part 2. To attach documentation, click on the Attachments tab and then on the Add Attachments button. Select a Document Type of either Work Commitment Expense or Supporting Documentation. It is optional to add to the Comments field.

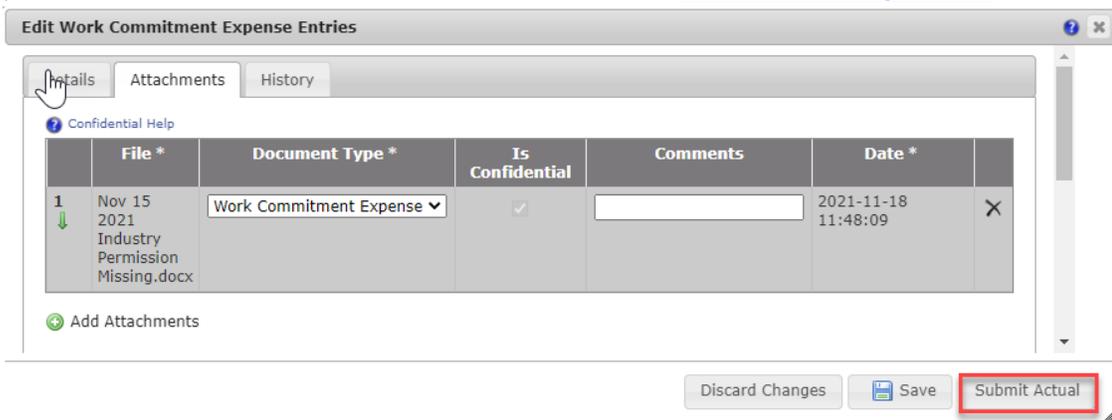
The screenshot shows the 'Edit Work Commitment Expense Entries' window with the 'Attachments' tab selected. The 'Attachments' tab is highlighted in red. Below the tabs, there is a 'Confidential Help' link. The main table has the following columns: File, Document Type, Is Confidential, Comments, and Date. The 'Add Attachments' button is highlighted in red. The table shows one attachment with the following details: File: Nov 15 2021 Industry Permission Missing.docx, Document Type: Work Commitment Expense, Is Confidential: checked, Comments: (empty), Date: 2021-11-18 11:48:09. At the bottom, there are buttons for 'Discard Changes', 'Save', and 'Submit Actual'.

File *	Document Type *	Is Confidential	Comments	Date *
1 Nov 15 2021 Industry Permission Missing.docx	Work Commitment Expense	✓		2021-11-18 11:48:09

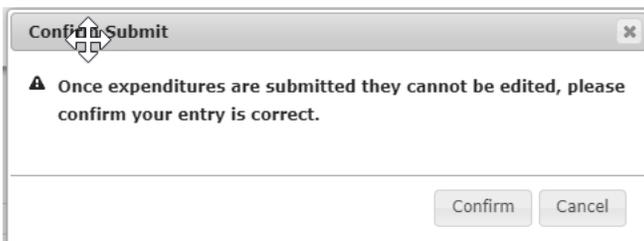
14. If you wish to Save your work as draft and come back to it later, click on the Save button; An Actual entry can be removed, added or modified until the Submit Actual button has been clicked. Documents on the Attachments tab can be removed or added until the Submit Actual button has been clicked;



15. When ready to submit Actual Expense click the Submit Actual button. This will lock the Submitted Expense Amount fields for the reporting year. If you require a change to be made, please contact the ER Service Desk at 1-855-219-9373 or ER.ServiceDesk@gov.sk.ca



16. When you click on the Submit Actual button, a dialog box will appear asking you to make sure your entry is correct;



17. Click on the Confirm button to indicate you have checked that information is correct and ready for final submission;

18. After clicking on the Submit Actual button, the Blue Edit Pencil button will disappear from the Obligations History section and will be replaced with a View Details button;

Obligations History

	Obligation Year	Notifications	Annual Expenditure Amount
	2013 - 2014		▶ \$10,000.00
	2014 - 2015		▶ \$10,000.00
	2015 - 2016		▶ \$15,000.00
	2016 - 2017		▶ \$20,000.00
	2017 - 2018		▶ \$20,000.00
	2018 - 2019		▶ \$20,000.00
	2019 - 2020		▶ \$20,000.00
	2020 - 2021		▶ \$20,000.00
	2021 - 2022		▶ \$20,000.00

19. To review submitted data, click on the View Details button. A View Work Commitment Expense Entries window will open and default to the Details tab.

Note: The fields on the Details tab will be greyed out and locked for editing. The Save and Submit Actual buttons will have been removed;

View Work Commitment Expense Entries

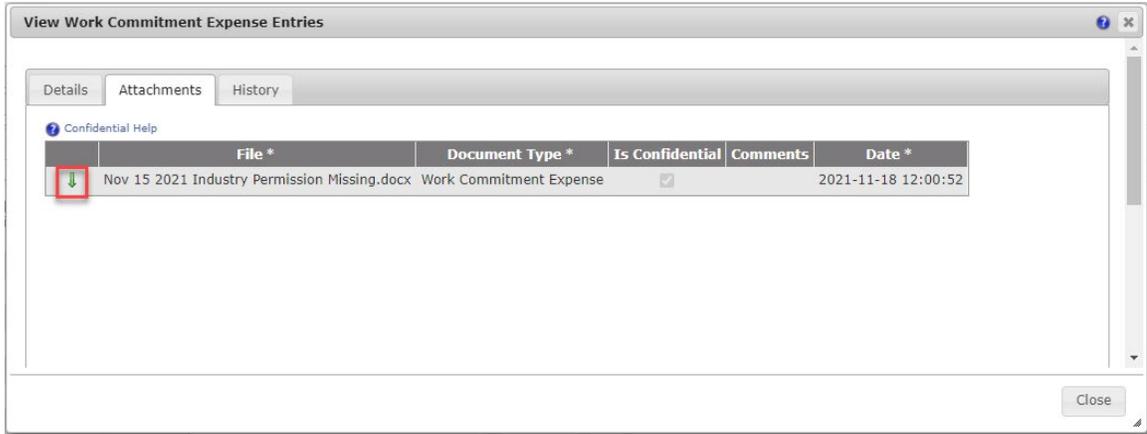
Details Attachments History

Reporting Period From Date: 2021-11-15 Reporting Period To Date: 2022-11-15
 Current Hectares: 8806.523 Submission Date: 2021-11-18

Expense Type	Expense Category	Reference No.	Submitted Expense Amount	Approved Expense Amount	Denied Expense Amount	Comments
Estimate			3,000.00			
Actual	Exploratory			0.00	0.00	
Actual	Drilling			0.00	0.00	
Total Amounts			\$0.00	\$0.00	\$0.00	

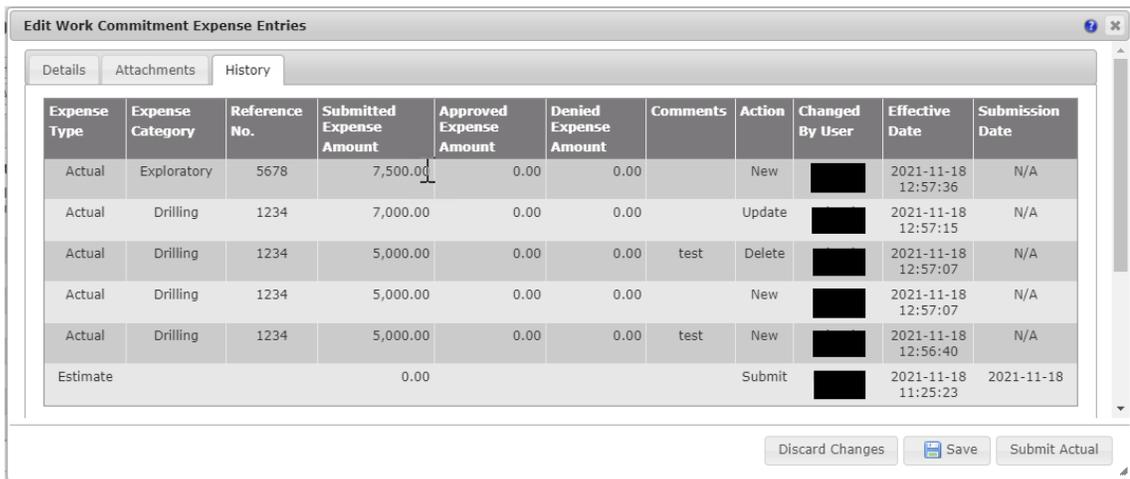
Close

20. The Attachments tab will be locked down for adding or removing documents. The documents attached before submission are displayed and a Green Download button is available on the left hand side to click on to download a copy of these documents, if need be;



21. A History tab is available for all transactions for the obligation year before Actual amounts were submitted. A listing is provided with the oldest transaction at the bottom and the newest or most recent transaction at the top.

Note: For Business Associates who have more than one employee with permission to enter and submit Permit Expenditures, this tool will be helpful to provide a record of changes made. The History tab records both Estimate and Actual submissions, including amounts, the ID of the user who made changes as well as an Effective Date for the change;



The notification for Annual Estimates and Actuals Notice will still be generated at the end of the permit year. In the notification it notes that Estimates and Statements of Actuals and their supporting documentation may be submitted to the ER Service Desk. This will be removed in a future release. Until then, please ignore the direction.

Questions ? ER Service Desk Phone : 1-855-219-9373 Email : ER.ServiceDesk@gov.sk.ca