

# SASKATCHEWAN EPAP on Petrinex Overview

February 10, 2016

# Agenda



1. Changes & Similarities between AB and SK
2. Next Steps
3. Support & Information
4. Petrinex Learning Resources for EPAP
5. Q&A
6. EPAP Functional Areas
  - a. Declaration Reporting Overview
  - b. Workflow Overview
  - c. CAI Process and Query CAI
  - d. EPAP Dashboard

# 1. Changes & Similarities between AB & SK



- Unique Subtypes
- EPAP Declaration Reporting
- Monthly CAI Process
- Workflow Process

# Subtype Differences for CAI & Declaration Reporting



## Alberta Only

- Crude Bitumen & Sulphur Reporting BTs (331, 341, 342, 343, 345)
- Gas BTs Issued by AER Only (365, 366, 367)
- Injection Facilities (502, 508, 509)

## Saskatchewan Only

- Heavy Crude & Swab BTs (313, 314, 316, 325, 326, 327)
- Injection Facilities (510, 511, 516, 517, 518, 519)\*
- Pipelines (210, 211, 212, 213, 214)\*

\* *Subtypes are used in new CAIs found only in Saskatchewan currently.*

# EPAP Declaration: Declaration Signatories Page



- Edit Declaration Signatories is where signatories are created for both the EPAP and EVAP audit programs in Saskatchewan.
- It is not possible to attach an EVAP signatory to an EPAP declaration and vice versa.
- If the same person is a signatory for both audit programs, the signatory record must be created twice (once for EPAP and once for EVAP).

# EPAP Declaration: Submission



- Edit screen is the same as Alberta. Minor changes to some theme titles, but still the same themes.
- Minor changes to theme information to reflect ECON directives (theme objective, regulatory references, facility subtypes, subtype exceptions).
- Online submission process is the same as Alberta. Complete themes, add signatories, attach signed copy of PDF declaration.
- PDF contains some additional assertions for executive sign-off. Attachments (A,B,C) are the same as Alberta.

# EPAP Declaration: New Assertions in PDF



5. I/We recognize that Compliance Assessment Indicator (CAI) items on the CAI Report provide useful information to assess compliance with measurement and reporting requirements.
6. I/We recognize that the Regulator has recently introduced Directive PNG017: Measurement Requirements for Oil and Gas Operations that describes measurement requirements in more detail.
7. I/We have committed appropriate resourcing to ensure measurement remediation at our facilities for the following one-year periods:

Period ending March 31, 2017	25% implemented
Period ending March 31, 2018	50% implemented
Period ending March 31, 2019	75% implemented
Period ending March 31, 2019	100% implemented

8. I/We recognize the authority of the regulator to make measurement and reporting requirements and enforce compliance with them.

# Monthly CAI Process: Online Screen & CSV Report



- No change to monthly process. CAIs will be generated on the same day as Alberta (Volumetric & Waste Plant Reporting Deadline).
- No change to online screen or CSV report format.
- Changes to some of the CAI numbers.
  - 6 CAI numbers in Alberta will not be in Saskatchewan.
  - 3 CAI numbers for Saskatchewan not currently in Alberta.
  - Some minor changes to facility subtypes and volumetric activities for a few CAI numbers in Saskatchewan.



# Monthly CAI Process: CAI Numbers not in Saskatchewan



- Volumetric edits prevent certain CAI numbers from being generated in Saskatchewan.
  - 112 – Linked well status fluid inappropriate for facility subtype.
  - 113 – Invalid well links – single well battery.
  - 173, 174, 175 – Proration factor reported for non-proration BT (Oil, Gas, Water)
- CAIs pertaining specifically to bitumen are not required in Saskatchewan.
  - 172 – Missing gas volume for a bitumen well.

# Monthly CAI Process: CAI Numbers only in Saskatchewan



- CAI numbers pertaining to inventory adjustment activity are being introduced in Saskatchewan.
  - 178 – Storage inventory adjustment over 10.0 for all products.
  - 179 – Inventory adjustment over 10.0 for all products.
  - 180 – Load inventory adjustment over 10.0 for all products.

- Workflow process is the same as Alberta.
- Industry initiates the same workflow types (Industry Review, Voluntary Self Disclosure).
- List of Non-Compliance Events (NCEs) is the same as Alberta.
- Industry responds to the same Regulator initiated workflow types (CAI, BA).

# Finished Status for Industry Review Workflow



- Finished status allows Industry to complete investigation and not share information with the Regulator.
- Industry can set an Industry Reviewed Date, just as with the Closed status.
- Workflow cannot be edited when in a Finished status.
- Workflow can be moved back to a Pending status. This allows Industry to add information in the event they wish to share investigation with the Regulator in the future.
- If workflow is moved back to Pending status, any Industry Reviewed Dates will be removed and must be reset when the workflow is completed.

## 2. Next Steps



- Follow the Steps to Readiness
- Review the Industry Readiness Guide and other readiness materials on the Initiatives Page.
- Plan & Communicate

Steps to Readiness	Timing
1. Read and fully understand the new Directives and the EPAP Guideline	<b>-Now</b>
2. Know who your EPAP <i>Change Leader</i> is and how they can help.	<b>-Now</b>
3. Read and fully understand the Industry Readiness Guide.	<b>-Now</b>
4. Ensure your Petrinex BA User Security Administrator is aware and ready. <ul style="list-style-type: none"> <li>• Identify future EPAP users at your BA</li> <li>• Set up EPAP roles and users</li> </ul>	<b>-Now</b> <b>-April</b>
5. Be aware of important dates.	<b>-Now</b>
6. Ensure your staff are trained.	<b>-Ongoing</b>
7. Take the opportunity to test the new Declaration Facility Upload File.	<b>-Mar-Apr</b>
8. Take the opportunity to submit a Trial Declaration.	<b>-Apr-Nov</b>

# Plan & Communicate

## *Change Leader Role and Expectations*



### **Role of the EPAP Change Leader**

1. **Primary Point of Contact** for the BA with ECON & Petrinex for implementation.
2. **Disseminate information** to those in the BA that need the information to prepare.
3. **Ensure your company is ready** to report through Petrinex after “go-live”.

### **Expectations of the EPAP Change Leader**

- **Understand** ECON requirements and Petrinex processes.
- **Communicate** effectively with ECON & Petrinex:
  - If you need more information, assistance, additional clarity let us know.
- **Communicate** effectively with Internal and any affected External Stakeholders:
  - Management, operational, accounting and IT staff (as appropriate)
  - Consultants and external software vendors
- **Plan** ahead, plan well



## Saskatchewan EPAP Reporting on Petrinex

### Documents/Links

- [Industry Readiness Guide](#) - Version 1.0
- Link to [ECON EPAP Website Page](#)
  - Includes links to:
    - EPAP Letter dated September 4, 2015 on Future Changes to Oil and Gas Measurement and Reporting Requirements and Implementation on EPAP in Saskatchewan
    - Directive PNG076: Enhanced Production Audit Program (EPAP)
    - Guideline PNG028: Implementing and Operating the Enhanced Production Audit Program (EPAP)
    - CAIs & Declaration Themes
    - Noncompliance Events

### Tips and Job Aids (Coming Soon)

- EPAP Declaration Reporting Theme Submission Upload Document
- EPAP Declaration Reporting Theme Submission Template
- How to Use the Enhanced Production Audit Program (EPAP) Dashboard
- Enhanced Production Audit Program (EPAP) Workflow

### Change Leader Meetings (information will be posted after the sessions)

Meeting #1 - February 10, 2016 (Calgary, Alberta)

Meeting #1 - February 23, 2016 (Estevan, Saskatchewan)

## Go to the Initiatives Page on the Petrinex Website to find:

- [The Industry Readiness Guide](#)
- [Links to ECON's EPAP Website Page](#)
- [Updates to Tips and Job Aids](#)
- [Presentation Materials from Change Leader Meetings](#)



# Industry Interoperability Testing

## *Declaration Theme Facility Upload*



- Testing is open from March to April.
- Send testing files as early as possible.
- Processing times will vary depending on when the file is received.
- All files must be sent with the Transmittal Form completed.
  - See Appendix 8 in the Industry Readiness Guide

# Industry Interoperability Testing

## *Declaration Theme Facility Upload*



- A Job Aid will be available before March which includes:
  - Instructions for completing the CSV file
  - Facility Responses and Edits
  - Common Issues with Full Form Replacement
- Testers will be sent an e-mail with:
  - Processing Results
  - Explanation of any Problems
  - Recommendations (if appropriate)

# Important Dates



<u>SASKATCHEWAN EPAP MILESTONES</u>	<u>TIMING</u>
Updates to Industry Readiness Guide & Initiatives Page	Ongoing
Change Leader Meeting #1 (Calgary & Estevan)	February 10 & 23, 2016
Post Job-Aid for Declaration Upload & CSV Upload Template	February, 2016
Industry Interoperability Testing Window	March-April, 2016
EPAP Implementation in Saskatchewan	April 1, 2016
EPAP Functionality for Saskatchewan available in Petrinex	April 7, 2016
Updated Training Modules & Job Aids	April, 2016
Trial Declaration Period	April 1-November 30, 2016
Change Leader Meeting #2 (if required)	September/October, 2016
Deadline for filing First Declaration	March 1, 2018

# 3. Support and Information



## Questions re. EPAP Program and Rules:

- **PNG Support Desk**  
1-855-219-9373  
[PNG.Support@gov.sk.ca](mailto:PNG.Support@gov.sk.ca)
- **Blake Linke, Compliance Program Manager**  
306-787-6494  
[blake.linke@gov.sk.ca](mailto:blake.linke@gov.sk.ca)

## Petrinex “How to” Questions:

- **Petrinex Service Desk**  
403-297-6111 (Calgary)  
1-800-992-1144 (Other Locations)  
[PetrinexSupport@petrinex.ca](mailto:PetrinexSupport@petrinex.ca)

## On-going Collaboration:

- **The EPAP Stakeholder Group (AER/ECON/Industry/Petrinex) will be the primary vehicle for collaboration with respect to on-going EPAP concerns including Petrinex enhancements.**

## 4. Petrinex Learning Resources for EPAP



### EPAP Training Modules:

- a. Module 8.01 Manage EPAP Declaration
  - b. Module 8.02 Manage EPAP Workflow
  - c. Module 8.03 Query CAI Process
  - d. Module 8.04 Query Enhanced Production Audit Program
- Training modules can be accessed by logging in to the training system on the Petrinex website.
- Training modules currently exist for Alberta and are being updated for Saskatchewan.

## 4. Petrinex Learning Resources for EPAP



### EPAP Job Aids:

- a. EPAP Declaration Reporting Theme Submission Upload Document  
*Instructions for completing the CSV upload*
  - b. EPAP Declaration Reporting Theme Template
  - c. How to Use the Enhanced Production Audit Program (EPAP) Dashboard
  - d. Enhanced Production Audit Program (EPAP) Workflow  
*Overview of different Workflow Types and BA/User Security*
- Job Aids will be posted on the initiatives page as they are updated for Saskatchewan.
  - Job Aids currently exist for Alberta and can either be found in the Resource Centre on the Petrinex website or by link from the online training system.



## User Resource Centre

### A. TRAINING MODULES

Login

- Updates/Information

### B. [TRAINING JOB AIDS](#)

### C. [TIPS AND ALERTS](#)

### D. [ALBERTA FREQUENTLY ASKED QUESTIONS](#)

### E. [SASKATCHEWAN FREQUENTLY ASKED QUESTIONS](#)

### F. PRESENTATIONS

To obtain your Training ID and password, click on [Access The Petrinex Online Training System.](#)

- Access training modules through the Resource Centre.
- New users will complete the self-registration process after clicking Login.
- The link at the bottom of the screen provides instructions on completing the self-registration process.

### Welcome - Please Log In

#### Already a Member?

Login Name

Password

Login

☐ Keep me logged in

[Forgot your login name?](#)

[Forgot your password?](#)

#### Not a Member Yet?

If you do not have a login name and password, please register.

Members have access to special features:

- Post messages to discussion forums
- Send a question to subject matter experts
- Manage your subscriptions and social network

Register Now

- Existing users login on the left of the screen.
- New users click Register Now on the right to complete self-registration.



## My Assignments

Showing 1 to 5 of 8

**Show All** **Curricula** eLearning To Do Schedule

<b>Curriculum: Common Functions Collection</b>	<b>Not started</b> Curriculum	11/27/2015
<b>Curriculum: Monthly Reporting Collection</b>	<b>Not started</b> Curriculum	11/27/2015
<b>Curriculum: Infrastructure Collection</b>	<b>Not started</b> Curriculum	11/27/2015
<b>Curriculum: Annual Reporting Collection</b>	<b>Not started</b> Curriculum	11/27/2015
<b>Curriculum: Audit Reporting Collection</b>	<b>Not started</b> Curriculum	11/27/2015

1 2 Next

**Sort by ...** Date

**Show content ...**

... with title containing:

... currently:

in any state

... in Curriculum:

All

... in Education Plan:

between:

and:

- Training modules are grouped by functionality into collections.
- To get to the EPAP modules, click Learn, Curricula, then select the Audit Reporting Collection

## Audit Reporting Collection

Type: Standard

Approval Required: No



Withdraw

Date Started: Not Started

Progress: Not started

Last Accessed: 2/5/2016

Content

Resources

Additional Data

Title

Information

②	Course	i	8.01 Manage EPAP Declaration		Open
②	Course	i	8.02 Manage EPAP Workflow		Open
②	Course	i	8.03 Query CAI Process		Open
②	Course	i	8.04 Query Enhanced Production Audit Program		Open
②	Course	i	Job Aid - Enhanced Production Audit Program (EPAP) Workflow		Open
②	Course	i	Job Aid - How to Use the Enhanced Production Audit Program (EPAP) Dashboard		Open

Close

- The audit collection contains all training modules and links to the related job-aids pertaining to both EPAP and EVAP.

# 5. Questions?

## 6. EPAP Functional Areas



- a. Declaration Reporting Overview
- b. Workflow Overview
- c. CAI Process and Query CAI
- d. EPAP Dashboard

## 6. EPAP Functional Areas



### a. Declaration Reporting Overview

# Declaration Timing & Availability



- Created in the company's specified Declaration Month.
- Generated on the day of the Volumetric Data & Waste Management Reporting Deadline.
- Available for edit the following day.

# Screen View – Expanded Declaration

[Audit] > [EPAP]

## Edit EPAP Declaration

1 EPAP Declaration for November 2015		Due : 2016-01-31		Incomplete		Facility Count : 53	
--------------------------------------	--	------------------	--	------------	--	---------------------	--

Theme Status	Facility-Level (FL)			Company-Level (CL)			Both Facility & Company-Level Controls					Not Applicable	No Controls	Conclusion	
	Facilities Evaluated	Effective	Facilities	Evaluated	Effective	Facilities w/ Both	Evaluated	Effective	Evaluated	Effective					
2 1. Measurement System Design and Installation															
Complete 3	0	0	0	0	0	0	53	53	53	53	53	0	0	Acceptable	
+ 2. Measurement Device Maintenance (Calibration, Inspection and Proving)															
Complete	53	53	0	0	0	0	0	0	0	0	0	0	0	Deficient	
+ 3. Measurement Device Operation															
Complete	0	0	0	0	0	0	53	53	53	0	0	0	0	Acceptable	
+ 4. Sampling & Analysis															
Complete	0	0	0	51	0	0	0	0	0	0	0	0	0	Not Evaluated	
+ 5. Proration Testing - Oil/Bitumen/In-situ/Sulphur Reporting at Oil Sands Wells															
Complete	0	0	0	0	0	0	0	0	0	0	0	3	0	Not Applicable	
+ 6. Proration Testing - Gas Well															
Complete	0	0	0	0	0	0	0	0	0	0	0	0	2	Not Evaluated	
+ 7. EFM Systems															
Complete	53	53	53	0	0	0	0	0	0	0	0	0	0	Acceptable	
+ 8. Field Records															
Complete	0	0	0	0	0	0	53	53	53	53	0	0	0	Acceptable	
+ 9. Trucked Volumes															
Complete	3	3	2	3	3	2	47	47	47	47	47	0	0	Acceptable	
+ 10. Fuel/Flare/Vent															
Complete	0	0	0	0	0	0	51	51	51	0	0	1	1	Acceptable	
+ 11. Schematic															
Complete	0	0	0	53	53	53	0	0	0	0	0	0	0	Acceptable	
+ 12. Facility Master Data Set Up															
Complete	0	0	0	53	53	0	0	0	0	0	0	0	0	Deficient	
+ 13. Calculation Factors															
Complete	0	0	0	0	0	0	51	51	0	51	0	0	0	Deficient	
+ 14. Monthly Volumetric Activity Reporting															
Complete	3	3	2	3	3	2	47	47	47	47	47	0	0	Acceptable	
+ Declaration Signatories 4		Incomplete													
+ Attached Signed Declaration 5		Incomplete													

6 7 8

Print Submit Download



# Screen View – Declaration Reporting Theme Top Portion

BA: 1000 DEMO COMPANY  
Name: sfreeman

[\[Audit\]](#) > [\[EPAP\]](#)

## Edit EPAP Declaration Facilities

EPAP Declaration for November 2015	Due: 2016-01-31	Status: Incomplete	Facility Count: 53
------------------------------------	-----------------	--------------------	--------------------

Theme Status	Facility-Level (FL)			Company-Level (CL)			Both Facility & Company-Level Controls					Not Applicable	No Controls	Conclusion
	Facilities	Evaluated	Effective	Facilities	Evaluated	Effective	w/ Both	Evaluated	Effective	Evaluated	Effective			
4. Sampling & Analysis														
Incomplete	0	0	0	51	5	5	0	0	0	0	0	0	0	7

### Theme Information 1

#### Theme Name

4. Sampling & Analysis

#### Theme Description

Sampling and analysis of gas, hydrocarbon fluids and water

#### Control Objective

Ensure that representative samples are collected and analyzed using appropriate equipment and procedures in accordance with AER requirements

#### Regulatory Reference

D017: 8, 9, 11, 14 Appendix 4, 5, 7

#### Facility subtypes applicable to this theme

207, 208  
311, 321, 322, 331, 341, 342, 343, 344, 345, 351, 361, 362, 363, 364, 365, 366, 367, 381  
401, 402, 403, 404, 405, 406, 407  
501, 502, 504, 505, 506, 508  
611, 612, 621, 622, 631, 632, 671, 673, 675  
701  
902, 903

#### Subtype Exceptions

501, 508 - If the EOR approval is a water flood (refer to Table 8.3. on page 160 of Directive 017).  
406, 407, 671, 673 675 - Unless facility is not receiving from or delivering to an upstream facility.



# Screen View – Declaration Reporting Theme

## Bottom Portion

Set Defaults 5

		Applicable ▼	FL Controls ▼	FL Evaluated ▼	FL Effective ▼	CL Controls ▼	CL Evaluated ▼	CL Effective ▼			 
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Facilities 2

Facility Name : ABBT0150000 - SINGLE-WELL GAS BATTERY 1

Location : 00-06-05-014-02 W04 4

<span style="color: red; font-weight: bold;">3</span> Facility ID	Subtype	Applicable	FL Controls	FL Evaluated	FL Effective	CL Controls	CL Evaluated	CL Effective	Reference	Description	Filter Reset
ABBT0150000 <span style="color: red; font-weight: bold;">4</span>	351	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Audit 1		
ABBT0150001	311	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Audit 1		
ABBT0150002	361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
ABBT0150003	361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ABBT0150004	361	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ABBT0150005	361	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Not applicable explanation.	
ABBT0150006	351	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No controls explanation.	
ABBT0150007	361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

<< < 1 2 >

### CONCLUSION

Considering all levels of existing Controls and evaluations performed, what is the overall level of effectiveness of the Controls for this Theme?

▼ 6

# 6. EPAP Functional Areas



## b. Workflow Overview

- A workflow is form of communication and documentation relating to a specific topic between stakeholders.
- Workflow topics generally refer to:
  - CAIs
  - Declarations
  - Non-Compliance Events
- Workflows can be created either by the Regulator or Industry depending on the workflow type.

# Summary of Workflow Types

SUMMARY OF WORKFLOW TYPES		
Workflow Type	Initiated By	Workflow Purpose
Industry Review	Industry	For industry to proactively manage monthly CAIs by conducting their own internal investigations, assigning an Industry Reviewed Date, and optionally sharing this information with ECON.
Voluntary Self Disclosure	Industry	For Industry to self-disclose an identified noncompliance event to ECON and communicate the steps that will be taken to remediate the issue.
BA/CAI Level Action Item	ECON	An enforceable request for information by ECON at either a BA level (pertaining to a declaration review or general operator inquiry) or at a CAI level (pertaining to a CAI investigation).

# Summary of the Industry Review Workflow

SUMMARY OF INDUSTRY REVIEW WORKFLOW		
Features	Details	Benefits
Industry Reviewed Date	<ul style="list-style-type: none"> <li>Set by industry.</li> <li>Allows company to tag CAI as investigated for a period of time (up to 5 years).</li> <li>Not the same as Regulator Acceptable Date.</li> </ul>	Proactive management of monthly CAIs.
Multiple Facilities	<ul style="list-style-type: none"> <li>Ability to attach multiple facilities to one CAI investigation.</li> <li>Facilities can be added to the review even if they have not yet generated a CAI.</li> </ul>	Address multiple facilities relating to a CAI in one investigation.
Templates	<ul style="list-style-type: none"> <li>Provided for certain CAIs as a guideline regarding information ECON may require to assign a Regulator Acceptable Date</li> </ul>	Maximize likelihood of ECON acceptance.
Attachments	<ul style="list-style-type: none"> <li>Ability to attach supporting documents.</li> </ul>	All relevant information for the investigation is online in one place.
Share with ECON	<ul style="list-style-type: none"> <li>Option to share investigative work with ECON.</li> </ul> <p><i>Security: Operators may utilize the Petrinex user role security model in determining which users have the ability to share information with ECON.</i></p>	ECON can leverage off of Industry investigation to set Regulator Acceptable Date.

# Workflow Statuses & Security



- Workflows progress through different statuses over their life cycle.
- The progression of statuses is subject to security rules that govern which stakeholder is responsible for that workflow at the time and which users may edit the workflow.



# Screen View – Request Workflow

[\[Audit\]](#) > [\[EPAP\]](#)

## Request EPAP Workflow

### WORKFLOW DETAILS

**Title:**

**BA ID:** 1000 DEMO COMPANY

**Workflow Type:** 1

**CAI:** 2

**Production Month:** 3

**Status:** Open

**Related Workflow #:** 4  

5

# Screen View – Edit Workflow

## Top Portion

[\[Audit\]](#) > [\[EPAP\]](#)

### Edit EPAP Workflow - Admin

WorkFlow #: 3711

GO

#### WORKFLOW DETAILS <sup>1</sup>

<b>Title:</b>	<input type="text" value="Questionable Fuel"/>	<b>Industry Contact:</b>	Steve Testing vipir_syt@enr.gov.ab.ca	1 - 111 222 3333
<b>BA ID:</b>	1000 DEMO COMPANY	<b>Regulator Contact:</b>	Jane Smith vipir_syt@enr.gov.ab.ca	1 - 403 297 4613
<b>Workflow Type:</b>	<input type="text" value="Industry Review"/>	<b>Created:</b>	Steve Testing on 2016-01-26 13:19:22 1000 DEMO COMPANY	
<b>CAI:</b>	125 Questionable Fuel Volume - Facility	<b>Last Updated:</b>	Steve Testing on 2016-01-26 13:19:31 1000 DEMO COMPANY	
<b>Production Month:</b>	2015-11			
<b>Current Status:</b>	Open			
<b>New Status:</b>	<input type="text" value="Closed"/>			
<b>Due Date:</b>				
<b>Related Workflow #:</b>				
<input type="button" value="Copy to New Workflow"/> <input type="button" value="Save to WIP"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/>				

#### FACILITY DETAILS <sup>2</sup>

Set Acceptable:   [YYYY-MM]

Select	Facility ID	Subtype	Facility Name	Regulator Acceptable	Industry Reviewed
<input checked="" type="checkbox"/>	ABBT0150001	311	SINGLE-WELL OIL BATTERY 1	2018-01*	2017-01*
<input checked="" type="checkbox"/>	ABBT0150009	311	SINGLE-WELL OIL BATTERY 2	2018-01*	

\* This date was set on another workflow.



# Screen View – Edit Workflow

## Bottom Portion

### NEW MESSAGE 3

Template:

Normal   **B**  U  

Enter information here.

**Save to WIP** **Submit** **Cancel**

### ATTACHMENTS 4

Document Description	Source File	Date Attached	
<a href="#">Fuel Volume Field Report</a>	Fuel Report.xlsx	2016-01-26	<b>Delete</b>

Document Description:

Please enter a document description...

Select a file:

Browse...

**Upload Attachment**

### HISTORY 5

Attached fuel report from field.

Steve Testing (1000 DEMO COMPANY) on 2016-01-26 13:22. Status: Open

# Industry Reviewed & Regulator Acceptable Dates



- The Industry Reviewed Date is set by a company and states that a CAI pertaining to a specific facility has been explained and requires no further internal investigation until the date specified.
- The Regulator Acceptable Date is set by the Regulator and states that a CAI pertaining to a specific facility has been deemed acceptable until the date specified.
- Only the Regulator can determine that a CAI is acceptable.

## 6. EPAP Functional Areas



### c. CAI Process and Query CAI

# CAI Timing & Availability



- Generated monthly on the day of the Volumetric & Waste Management Reporting Deadline.
- Available for review the following day.

# Methods for CAI Review



- Download the CAI Report.
- Review online in the Query CAI screen.

# Enhancements for CAI Analysis



The Query CAI screen offers the following features:

- A 12 month history of a CAI generated for a specific facility.
- Links to other areas in Petrinex
  - Query Volumetrics
  - Query Facility Infrastructure
  - EPAP Workflow Screens
- Access to prior month CAIs (query online or download)

# Screen View – Query CAI Summary View

[\[Audit\]](#) > [\[EPAP\]](#)

## Query CAI

CAI Summary (Filtering is ON)

[Refresh](#)

BA ID		BA Name	Facility ID	Subtype	CAI #	Month	Consec. Hits	Regulator Acceptable	Reg. W/f	Reg. Stat.	Industry Reviewed	Ind. W/f	Ind. Stat.	Cat.	Wgt	Filter
					(All)	2015-11	(All)	(All)		(All)	(All)		(All)	(All)	(All)	Reset
1	1000	DEMO COMPANY	ABBT0150001	311	125	2015-11	1	2018-01	3704	C	2017-01	3702	C	Anom.	4	View
	1000	DEMO COMPANY	ABBT0150004	361	151	2015-11	1					3690	O	Anom.	4	View
	1000	DEMO COMPANY	ABBT0150007	361	176	2015-11	16	2018-01	3710	C	2017-01	3709	C	Anom.	4	View
	1000	DEMO COMPANY	ABBT0150009	311	125	2015-11	1	2018-01	3704	C		New		Anom.	4	View
	1000	DEMO COMPANY	ABBT0150013	311	151	2015-11	2				2016-06	3703	F	Anom.	4	View
	1000	DEMO COMPANY	ABBT0150017	322	151	2015-11	25		3705	R		New		Anom.	4	View
	1000	DEMO COMPANY	4 ABBT0150017	322	158	5 2015-11	1		6 3706	O		6 3691	P	Anom.	1	View
	1000	DEMO COMPANY	ABBT0150017	322	166	2015-11	1					New		Anom.	1	View
	1000	DEMO COMPANY	ABBT0150018	362	165	2015-11	1					New		Anom.	2	View
	1000	DEMO COMPANY	ABBT0150019	322	125	2015-11	6					New		Anom.	4	View
	1000	DEMO COMPANY	ABBT0150019	322	138	2015-11	1					7 New		Anom.	1	View
	1000	DEMO COMPANY	ABBT0150019	322	151	2015-11	6				2016-06	3703	F	Anom.	4	View
	1000	DEMO COMPANY	ABBT0150028	351	176	2015-11	16					New		Anom.	4	View



# Screen View – Query CAI

[Audit] > [EPAP]

## Query CAI

CAI Summary (Filtering is ON)

Refresh

BA ID	BA Name	Facility ID	Subtype	CAI #	Month	Consec. Hits	Regulator Acceptable	Reg. W/f	Reg. Stat.	Industry Reviewed	Ind. W/f	Ind. Stat.	Cat.	Wgt	Filter
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	(All) ▾	2015-11	(All) ▾	(All) ▾	<input type="text"/>	(All) ▾	(All) ▾	<input type="text"/>	(All) ▾	(All) ▾	(All) ▾	Filter Reset
1000	DEMO COMPANY	<a href="#">ABBT0150007</a>	361	176	<a href="#">2015-11</a>	16	2018-01	<a href="#">3710</a>	C	2017-01	<a href="#">3709</a>	C	Anom.	1	<a href="#">View</a>
1000	DEMO COMPANY	<a href="#">ABBT0150028</a>	351	176	<a href="#">2015-11</a>	16					<a href="#">New</a>		Anom.	4	<a href="#">View</a>
1000	DEMO COMPANY	<a href="#">ABGS0150021</a>	621	176	<a href="#">2015-11</a>	16					<a href="#">New</a>		Anom.	4	<a href="#">View</a>
1000	DEMO COMPANY	<a href="#">ABGS0150022</a>	621	176	<a href="#">2015-11</a>	16					<a href="#">New</a>		Anom.	4	<a href="#">View</a>
1000	DEMO COMPANY	<a href="#">ABGS0150023</a>	621	176	<a href="#">2015-11</a>	13					<a href="#">New</a>		Anom.	4	<a href="#">View</a>

## CAI Details

Facility: AB BT 0150007 - MULTIWELL GROUP GAS BATTERY 5  
 Subtype: 361 - GAS MULTIWELL GROUP BATTERY  
 CAI #: 176 - Zero Fuel Volume - Facility

Location: 00-01-33-029-02 W5

BA ID	BA Name	Month	Activity	Product	Volume	Trigger	Trigger Description	Regulator Acceptable	Regulator Workflow	Industry Reviewed	Industry Workflow
1000	DEMO COMPANY	2015-11					Fuel usage is zero	2018-01	<a href="#">3710</a>	2017-01	<a href="#">3709</a>
1000	DEMO COMPANY	2015-10					Fuel usage is zero				
1000	DEMO COMPANY	2015-09					Fuel usage is zero				
1000	DEMO COMPANY	2015-08					Fuel usage is zero				
1000	DEMO COMPANY	2015-07					Fuel usage is zero				
1000	DEMO COMPANY	2015-06					Fuel usage is zero				
1000	DEMO COMPANY	2015-05					Fuel usage is zero				
1000	DEMO COMPANY	2015-04					Fuel usage is zero				
1000	DEMO COMPANY	2015-03					Fuel usage is zero				
4 ABC1	TEST CO. LTD.	2015-02					Fuel usage is zero				
ABC1	TEST CO. LTD.	2015-01					Fuel usage is zero				
ABC1	TEST CO. LTD.	2014-12					Fuel usage is zero				

Next 12 Months



## 6. EPAP Functional Areas



### d. EPAP Dashboard

# EPAP Dashboard Overview



The Dashboard pulls data from other EPAP functions into one screen:

- Workflows
- Declarations
- CAIs
  - Downloadable Monthly Reports
  - CAI Status - Acceptable

# Benefits of the Dashboard



- Effectively manage and prioritize EPAP workload
- Links to other areas in Petrinex
  - Query Facility Infrastructure
  - EPAP Workflow Screens
  - EPAP Declaration Screens
  - Query CAI
- Recommended starting point for EPAP reporting activities

# Screen View – EPAP Dashboard

[Audit] > [EPAP]

## EPAP Dashboard

Refresh

### + Workflow 1

Workflow	BA ID	BA Name	Status	Type	CAI #	Due Date	Title	Filter
			(All Active) v	(All) v	(All) v			Reset
<a href="#">3712</a>	1000	DEMO COMPANY	Industry	BA		2016-02-25	General Inquiry	GO
<a href="#">3705</a>	1000	DEMO COMPANY	Regulator	CAI	151	2016-02-26	Use of MC code	GO
<a href="#">3701</a>	1000	DEMO COMPANY	Open	IR	119		Excessive Venting	GO
<a href="#">3711</a>	1000	DEMO COMPANY	Open	IR	125		Questionable Fuel	GO
<a href="#">3690</a>	1000	DEMO COMPANY	Open	IR	151		151 - Questionable Use of Destination Codes	GO
<a href="#">3706</a>	1000	DEMO COMPANY	Open	RR	158		Oil Proration Factors	GO
<a href="#">3691</a>	1000	DEMO COMPANY	Pending	IR	158		158 - Excessive Oil Proration Factor (1) - O...	GO

### + Declarations 2

BA ID	BA Name	Status	Month	Due Date	Submitted Date	Filter
		(All) v				Reset
1000	DEMO COMPANY	Approved	2015-09	2015-11-30	2015-11-30	GO
1000	DEMO COMPANY	Approved	2014-09	2014-11-30	2015-08-05	GO
1000	DEMO COMPANY	Approved	2013-09	2013-11-30		GO

### + CAI Reports 3

Prod Month	Created Date		
2015-11	2016-01-21	Download	Query
2015-10	2015-11-20	Download	Query
2015-09	2015-10-21	Download	Query

### + CAI Status - Acceptable 4

☒ Expiry Mode ☐ Query Mode

BA ID	BA Name	Facility ID	CAI #	Regulator Acceptable	Regulator Workflow	Reg. Stat.	Industry Reviewed	Industry Workflow	Ind. Stat.	Filter
			(All) v	2016-01		(All) v	(All) v		(All) v	Reset
1000	DEMO COMPANY	<a href="#">ABBT0150001</a>	129	2016-01	<a href="#">3713</a>	C				
1000	DEMO COMPANY	<a href="#">ABBT0150009</a>	122	2016-02	<a href="#">3714</a>	C	2016-08	<a href="#">3715</a>	C	
1000	DEMO COMPANY	<a href="#">ABBT0150013</a>	122	2016-02	<a href="#">3714</a>	C	2016-08	<a href="#">3715</a>	C	

# End Presentation

# EPAP Admin Tasks & Abilities

Role	Task	Description
EPAP Admin	EPAP Dashboard	Screen allows user to organize EPAP workload (Workflows, Declarations, CAI Reports, CAI Acceptable Status)
	Query CAI	Screen provides ability to view, investigate, and manage CAIs month to month.
	Request EPAP Workflow	Allows user to create a new Workflow communication.
	Edit EPAP Workflow - Admin	Allows user to add, change, or respond to certain information in a Workflow communication and change the status such that the information is shared with AER.
	Query EPAP Workflow	Provides Read-Only access to a Workflow communication.
	Edit Declaration	Allows users to update or submit an EPAP Declaration.
	Query Declaration	Provides Read-Only access to an EPAP Declaration.
	Edit Declaration Signatories	Allows users to create or edit Signatories for the EPAP Declaration.
	Query Declaration Signatories	Provides Read-Only access to Signatories for the EPAP Declaration.
	Edit Audit Information	Allows the user to add or edit the Primary/Secondary contact information and view the Regulator Contact and Declaration Month information.
	Query Audit Information	Provides Read-Only Access to the Audit Information.



# EPAP Tasks & Abilities

Role	Task	Description
EPAP	EPAP Dashboard	Screen allows user to organize EPAP workload (Workflows, Declarations, CAI Reports, CAI Acceptable Status)
	Query CAI	Screen provides ability to view, investigate, and manage CAIs month to month.
	Request EPAP Workflow	Allows user to create a new Workflow communication.
	Edit EPAP Workflow	Allows user to add, change, or respond to information when Workflow Status is Open.
	Query EPAP Workflow	Provides Read-Only access to a Workflow communication.
	Query Declaration	Provides Read-Only access to an EPAP Declaration.
	Query Declaration Signatories	Provides Read-Only access to Signatories for the EPAP Declaration.
	Query Audit Information	Provides Read-Only Access to the Audit Information.

# CSV Theme Batch Upload Process – Cont'd.



## 1. Go to Data Submission, Batch Upload on Main Menu

- ☐ Monthly Reporting
  - ☐ Volumetric
  - ☐ Oil/LPG Pipeline Splits
  - ☐ Gas Pipeline Splits
  - ☐ Allocation
  - ☐ Waste Plant
  - ☐ Oil Sands
  - ☐ [WIP Maintenance](#)
- ☐ Allowable Costs
  - ☐ AC1
  - ☐ Facility Cost Centre Operator Change
  - ☐ Query Facility Cost Centre
  - ☐ AC2
  - ☐ AC3 - Allowable Costs Reallocations
  - ☐ AC4 - Operating Costs
  - ☐ AC5 - Custom Processing (CP) Fees Paid
- ☐ Data Submission
  - ☐ [Batch Upload](#)
  - ☐ [Batch Upload \(Schema checking only\)](#)
- ☐ Infrastructure



# CSV Theme Batch Upload Process – Cont'd.

2. Click Browse to select your upload file.

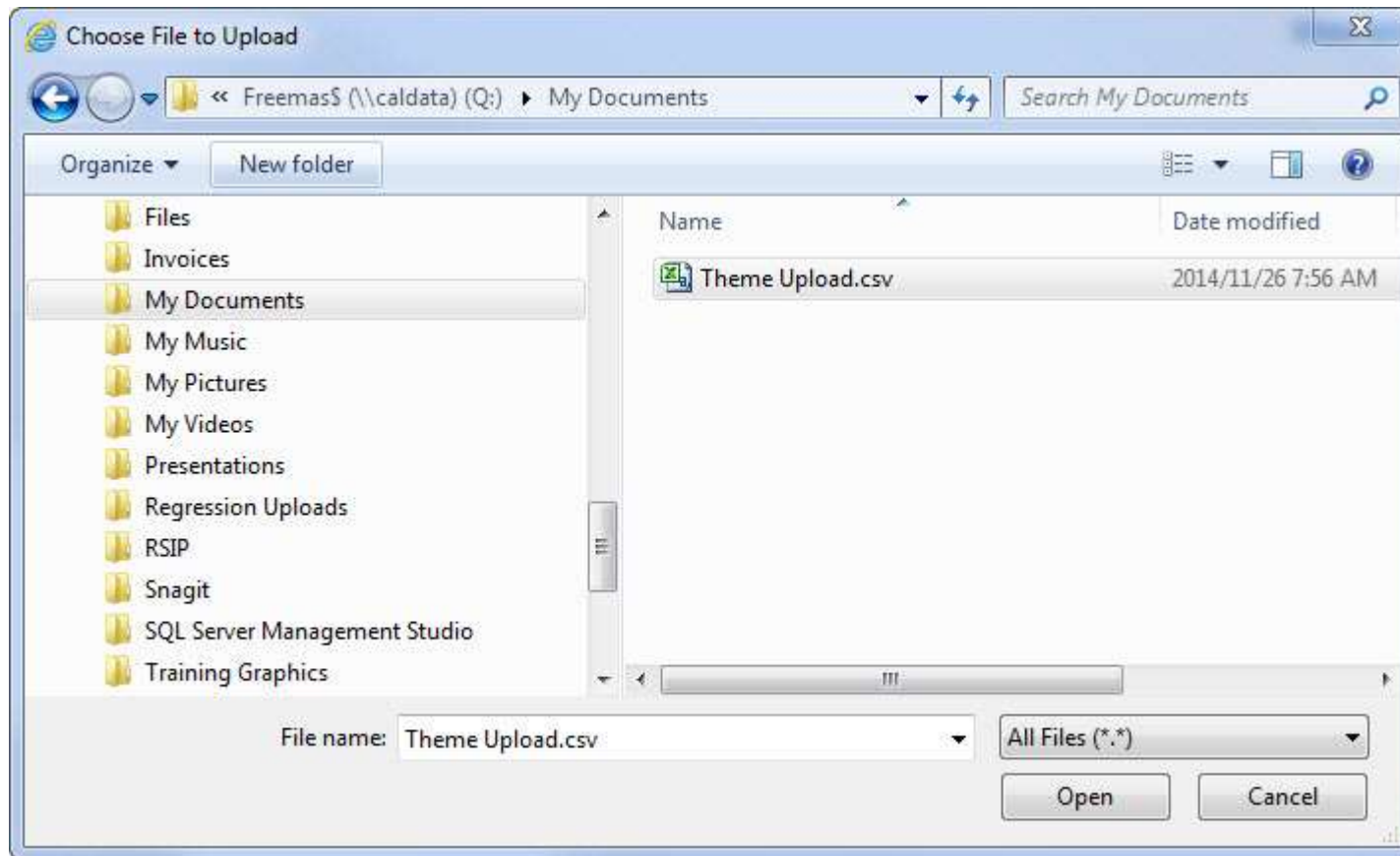
[\[Data Submission\]](#)

## Petrinex Batch File Submission

File Name:

# CSV Theme Batch Upload Process – Cont'd.

## 3. Select your upload file.



# CSV Theme Batch Upload Process – Cont'd.

4. Once file is selected, click Upload.

[\[Data Submission\]](#)

## Petrinex Batch File Submission

File Name:

# CSV Theme Batch Upload Process – Cont'd.



5. Go to your Inbox to view your upload results.

## Petrinex In-Box Notifications

Date Range	Notification #	Facility ID	Notification Recipient
<input type="text"/> To <input type="text"/>	<input type="text"/>	<input type="text"/>	Doe, John
			<input type="button" value="Go"/> <input type="button" value="Cancel"/> <input type="button" value="Reset"/>

<u>Date/Time</u>	<u>Notification #</u>	<u>Message Subject</u>
2014-11-26 08:06	AUD006	Validation Results Theme: "Success" - [Theme Upload.csv]

# Uploading the Signed PDF to the Declaration

1. Click the + to open the section, then click Browse to locate your file.

	Attached Signed Declaration	Incomplete
--	-----------------------------	------------

[Print](#) [Submit](#) [Download](#)

---

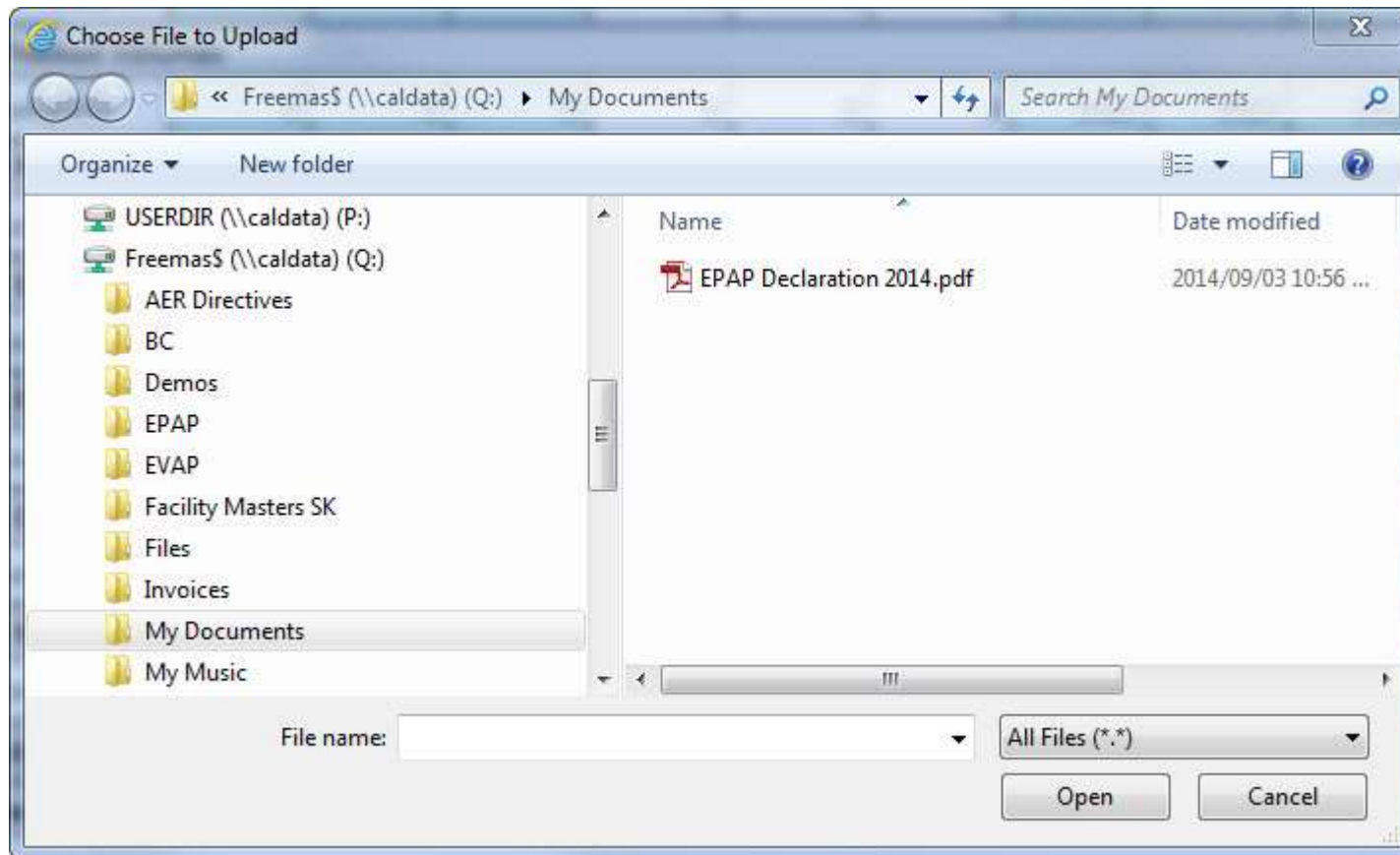
**Edit EPAP Attached Signed Declaration for June 2014**

<b>Clear</b>	<b>Document Name</b>	<b>Source File</b>	<b>Add/Change</b>
<input type="checkbox"/>	Signed EPAP Declaration		

[Save](#) [Cancel](#)

# Uploading the Signed PDF to the Declaration – cont'd.

2. Select your Signed PDF file.



# Uploading the Signed PDF to the Declaration – cont'd.



3. Click Save.

—	Attached Signed Declaration	Incomplete
---	-----------------------------	------------

[Print](#) [Submit](#) [Download](#)

Edit EPAP Attached Signed Declaration for June 2014

Clear

☐

Document Name

Signed EPAP Declaration

Source File

Add/Change

Q:\My Documents\EPAP

[Browse...](#)

[Save](#)

[Cancel](#)

# Uploading the Signed PDF to the Declaration – cont'd.



4. Section should update to Complete once file attached.

— Attached Signed Declaration	Complete
-------------------------------	----------

[Print](#) [Submit](#) [Download](#)

Edit EPAP Attached Signed Declaration for June 2014

Clear <input type="checkbox"/>	Document Name Signed EPAP Declaration	Source File EPAP Declaration 2014.pdf	Add/Change <input type="text"/> <a href="#">Browse...</a>
<a href="#">Save</a> <a href="#">Cancel</a>			



# Copy to New Workflow

- Title, Workflow Type, CAI/NCE, and Attached Facilities are copied.
- Old workflow number becomes Related Workflow number.

## Edit EPAP Workflow - Admin

WorkFlow #: 1552

GO

### WORKFLOW DETAILS

Title:	<input type="text" value="Industry Review Test"/>
BA ID:	0001 GLOBAL OIL LTD.
Workflow Type:	<input type="text" value="Industry Review"/>
CAI:	103 Unacceptable Oil Proration Factor - Proration Battery
Production Month:	2014-09
Current Status:	Open
New Status:	<input type="text" value="Open"/>

Due Date:

Related Workflow #:

Copy to New Workflow

Save to WIP

Submit

Cancel