

Volumetric Deficiency Invoice Review Process

Jurisdiction	Release/Revision Date	Location of Change in this Document	Comment
AB	June 1, 2023	Update to last section on learning tools available	
AB	April 27, 2023		Initial Release

Audience: Alberta Operators

Purpose:

This tip is to inform all Alberta Facility Operators that the Alberta Energy Regulator (AER) is introducing enhancements to Petrinex effective May 4, 2023, for an online process for the AER Volumetric & Waste Plant Deficiency Invoice Review. The volumetric deficiency invoice review process solution on Petrinex will eliminate the current manual, unstructured, inefficient, and cumbersome appeal (AER Enforcement Action Review) process and will allow Industry to both appeal their invoices and receive AER's decision through Petrinex.

For volumetric deficiency invoices issued before April 24, 2023, use the AER invoice review template provided in the "Related Information" section at the bottom of the Directive 007 webpage. Only invoices issued prior to April 24th 2023 will be accepted via email, mail or fax. Operators continuing to submit via this method after May 4th will be directed by the PA Help desk to submit their volumetric deficiency invoice review request through Petrinex.

Background:

The AER sets monthly deadlines by which volumetric reporting must be submitted in Petrinex. AER deficiency invoices are issued to the operators that have missing data and/or data discrepancies that were not corrected before the AER Volumetric Data and Waste Management Reporting Deadline. As per Directive 007: Volumetric and Infrastructure Requirements, a Licensee or Operator may request that the AER Production Data Services team review a volumetric deficiency invoice. The review request must be sent to the AER within



TIP

15 calendar days of the invoice date, or prior to the AER Enforcement Action Review Deadline identified on the Petrinex Reporting Calendar. The Licensee or Operator will receive the results of the review within 10 calendar days from making the request.

The rules will not be changing, only the communication, submission and response method for the Volumetric Deficiency invoice review request will now be via Petrinex.

The New Process:

- New Petrinex Industry Screens
 - Request Volumetric Deficiency Invoice Review
 - Edit Volumetric Deficiency Invoice Review
 - Query Volumetric Deficiency Invoice Review
 - Volumetric Deficiency Invoice Review Dashboard
 - Volumetric Deficiency Invoice Review Report
- Industry (the operator) or the AER (on behalf of an operator, under unique circumstances) can submit a review request in Petrinex. This request will include all related information including reasons for the review and uploading of the required documentation.
- AER staff (with the appropriate roles) will review all requests and can view the status of the reviews for all BAs.
- Industry staff (with the appropriate roles) can view a list of their BA's reviews and the status of those reviews.
- The AER and Industry will manage attachments and communicate the details of the review using a status indicator providing an audit trail.
- The AER will be able to set a decision to partially granted, granted, denied, or cancelled for the review request along with communication to Industry. If the decision is granted or partially granted, the AER will send the credit memo through the Manage Ministry Reporting area of Petrinex.
- All review information will be electronically transmitted between the BA (operator) and the AER via Petrinex.

Readiness Activities:

On May 4th, the User Security Administrator (USA) will be required to set up roles/tasks for this new functionality and assign users these roles/tasks. USAs

are encouraged to set up an Edit Role, Edit Admin and a Read-Only Role with the appropriate tasks. Only users with the Edit Volumetric Deficiency Invoice Review – Admin task will be able to submit a review to the Regulator. The following is one example of the setups for these roles and applicable tasks.

- **Edit Volumetric Deficiency Invoice Review**
 - Edit Volumetric Deficiency Invoice Review
 - Edit Volumetric Deficiency Invoice Review – Admin
 - Query Volumetric Deficiency Invoice Review
 - Request Volumetric Deficiency Invoice Review
 - Volumetric Deficiency Invoice Review Dashboard
 - Volumetric Deficiency Invoice Review Notifications
 - Volumetric Deficiency Invoice Review Report
 - Submit Report Request *
 - Ministry Invoices and Statements *
 - Upload Report Requests *
- **Volumetric Deficiency Invoice Review Read-Only**
 - Query Volumetric Deficiency Invoice Review
 - Volumetric Deficiency Invoice Review Dashboard
 - Volumetric Deficiency Invoice Review Report
 - Submit Report Requests *
 - Ministry Invoices and Statements *
 - Upload Report Requests *
- **Volumetric Deficiency Invoice Review Edit – Admin** (only an individual with the Edit – Admin role will be able to submit the review request to the Regulator).
 - Edit Volumetric Deficiency Invoice Review – Admin
 - Query Volumetric Deficiency Invoice Review
 - Request Volumetric Deficiency Invoice Review
 - Volumetric Deficiency Invoice Review Dashboard
 - Volumetric Deficiency Invoice Review Notifications
 - Volumetric Deficiency Invoice Review Report
 - Submit Report Requests *
 - Ministry Invoices and Statements *
 - Upload Report Requests *

Note: If the items indicated with the asterisk (*) are included in a role that the user already has been provided (i.e., comprehensive) then they do not need to be included in this new role. If the user will only be authorized for this role, then these tasks will need to be included.



TIP

Petrinex online help pages have been created and are available by clicking on the “Help” logo on the top right-hand side of the screen.

The Petrinex online learning module for this new functionality has been released and is available from the [Learning Centre](#). This new module can be accessed from your Learning Tab and searching for “4.07 Manage Volumetric Deficiency Invoice Reviews” and then selecting the appropriate link. If you require assistance please contact Petrinex Administration at petrinexadmin@petrinex.ca

More information:

Please contact the Petrinex Business Desk.

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