



Ontario  
Energy  
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de l'énergie  
de l'Ontario

# **RRR FILING GUIDE**

FOR ELECTRICITY TRANSMITTERS, ELECTRICITY  
RETAILERS, GAS MARKETERS AND UNIT SUB METERING  
PROVIDERS' REPORTING AND RECORD KEEPING  
REQUIREMENTS (RRR)

**PREPARED BY OEB STAFF**

Updated March 27, 2024

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# 1. Purpose

## RRR Filing Guide

The purpose of this RRR Filing Guide is to aid Electricity Transmitters, Electricity Retailers, Gas Marketers and Unit Sub Metering Providers (herein referred to as “licensees” or by their abbreviated names) in completing their RRR filings online.

## Pivotal UX System

To support the OEB’s [2019-2022 Business Plan](#) and OEB’s Strategic Blueprint that emphasize efficient, innovative and consumer-centric approach to energy regulation, the OEB has implemented the Pivotal UX as the RRR Filing System to support the OEB’s goals to modernize, and make regulatory reporting robust and more efficient.

Pivotal UX provides an intuitive interface to reduce reporting time, increase efficiency and make the RRR filing process more user friendly.

The UX platform also facilitates the opportunity for easier future enhancements through upgraded features to improve user experience.

## 2. Location of RRR Information

The RRR guidelines can be accessed through the 'Regulatory rules and documents' Reporting and record keeping requirements (RRR)

Highlights of the RRR webpage include:

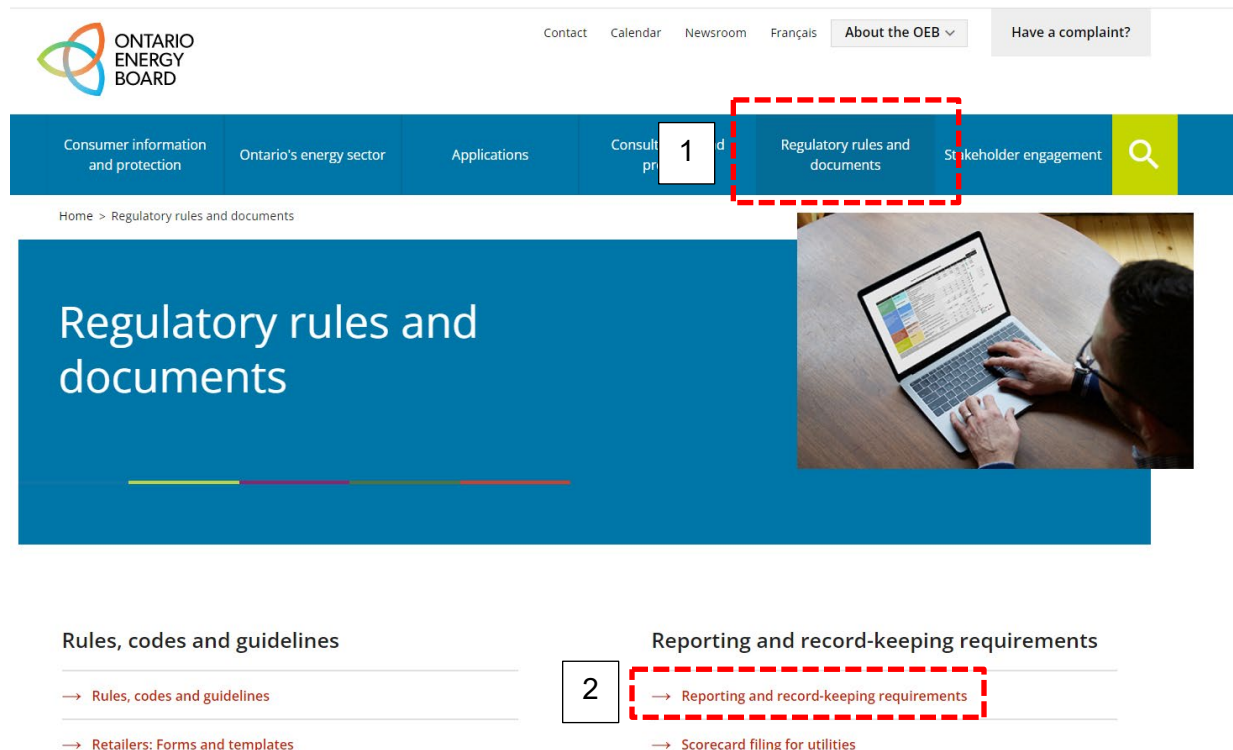
[RRR](#) – This webpage contains current documents and recent communications from the OEB regarding RRR.

[RRR Filing System](#) – The link to the RRR filing portal is found on this page.

[Reporting Schedule](#) – This section contains the filing schedule and countdown for impending filing deadlines for regulated entities.

[RRR User Add/Remove Request Form](#) – The link to the form to modify and request user access to the RRR portal.

[RRR Reports & Publications](#) – The link to past Yearbooks of Electricity Utility and Natural Gas Distributors is found in this section.



### 3. Registration

#### Registered User Privileges

Registration of at least one RRR user is necessary in order to fulfill the condition of its licence which requires submission of information “in the form and manner required by the Board.”

Only RRR registered users can access input forms for filing, based on the personal password issued to them by the OEB. The name of the RRR user is recorded in the OEB database as the submitter of the filing.

If you have forgotten your user ID and password, click on “Forgot your Password” on the RRR Filing System’s log-in webpage. You will be asked to provide your email address registered with the OEB. Your user ID and password will be sent to your inbox immediately.

#### Removing or Adding a Registered User

When the job function of a registered user changes, or when an employee leaves the organization, the OEB should be informed so that the RRR log-in ID assigned to the person can be cancelled. In order to assist users on the various ID’s for a distributor, the RRR Filing System includes a “My Profile” button located in the navigation bar as shown in the below screenshots. The “My Profile” button includes a registered list of all RRR user details for an electricity distributor. The user can review the user ID’s and advise the OEB if any changes need to be made.

To remove or add a RRR user, the primary regulatory contact should complete the “[Electronic User Form](#)” found on the [Filing systems](#) page of the OEB website and email to [registrar@oeb.ca](mailto:registrar@oeb.ca).

The email address used by the primary regulatory contact in sending the request should match the contact email on record with the OEB.

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- Action Center
- My Cases
- Case Documents
- RRR Filings
- Company
- ED Additional Reporting
- RRR Revision Request
- SOP Application
- SOP View Work-in-Progress
- Scorecard
- Submit Smart Meter Filings
- My Profile
- Settings

## CHOOSE REPORTING PERIOD

COMPANY NAME

---

### LICENCE

LICENCE TYPE	LICENCE EFFECTIVE DATE	LICENCE NUMBER
Electricity Retailer	May 07, 2020	
LICENCE STATUS	LICENCE EXPIRY DATE	
Issued	May 06, 2025	

### CHOOSE ELECTRICITY REPORTING YEAR

REPORTING YEAR ↓

- 2023
- 2022
- 2021
- 2020
- 2019
- 2018
- 2017
- 2016
- 2015
- 2014
- 2013

### CHOOSE GAS REPORTING YEAR

REPORTING YEAR ↓

- RRR Filings
- ED Additional Reporting
- RRR Revision Request
- SOP Application
- SOP View Work-in-Progress
- Submit an Application
- Submit Other Documents
- Scorecard
- My Profile
- Settings

## USER DETAILS

FIRST NAME	LAST NAME	COMPANY NAME
JOB TITLE		
EMAIL	FAX	
PHONE	EXT	

### ACCOUNT DETAILS

LOGIN

COMPANY	ROLE
<input type="checkbox"/> Test Electricity Distributor, London: Corporation ED-0993-0993 Issued	RRR Filer
<input type="checkbox"/> Test Electricity Distributor, London: Corporation ED-0993-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test Electricity Transmitter, London: Corporation ET-0099-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test Retailer/Marketer, London: Corporation ER-2019-0231 Issued	RRR Filer
<input type="checkbox"/> Test Retailer/Marketer, London: Corporation ER-2019-0231 Issued	Chief Executive Officer
<input type="checkbox"/> Test USMP, Toronto: Corporation ES-9999-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test USMP, Toronto: Corporation ES-9999-9999 Issued	RRR Filer
<input type="checkbox"/> Test Gas Marketer, Toronto: Corporation GM-9999-9999 Issued	RRR Filer
<input type="checkbox"/> Test Gas Marketer, Toronto: Corporation GM-9999-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test Gas Distributor, London: Corporation GD Issued	RRR Filer

### COMPANY DETAILS

The following users currently have RRR or complaints access on behalf of EPCOR Natural Gas Limited Partnership.

Name	Role
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	Complaint Contact
<input type="checkbox"/> [Redacted]	Complaint Contact
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	RRR Filer
<input type="checkbox"/> [Redacted]	Chief Information Security Officer

**PIVOTAL**

**USER DETAILS**

FIRST NAME: [Redacted] LAST NAME: [Redacted] COMPANY NAME: [Redacted]

JOB TITLE: [Redacted]

EMAIL: [Redacted] FAX: [Redacted]

PHONE: [Redacted] EXT: [Redacted]

**ACCOUNT DETAILS**

LOGIN: [Redacted]

COMPANY	ROLE
<input type="checkbox"/> Test Electricity Distributor, London: Corporation ED-0999-9999 Issued	RRR Filer
<input type="checkbox"/> Test Electricity Distributor, London: Corporation ED-0999-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test Electricity Transmitter, London: Corporation ET-0099-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test Retailer/Marketer, London: Corporation ER-2019-0231 Issued	RRR Filer
<input type="checkbox"/> Test Retailer/Marketer, London: Corporation ER-2019-0231 Issued	Chief Executive Officer
<input type="checkbox"/> Test USMP, Toronto: Corporation ES-9999-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test USMP, Toronto: Corporation ES-9999-9999 Issued	RRR Filer
<input checked="" type="checkbox"/> Test Gas Marketer, Toronto: Corporation GM-9999-9999 Issued	RRR Filer
<input type="checkbox"/> Test Gas Marketer, Toronto: Corporation GM-9999-9999 Issued	Chief Executive Officer
<input type="checkbox"/> Test Gas Distributor, London: Corporation GD Issued	RRR Filer

**COMPANY DETAILS**

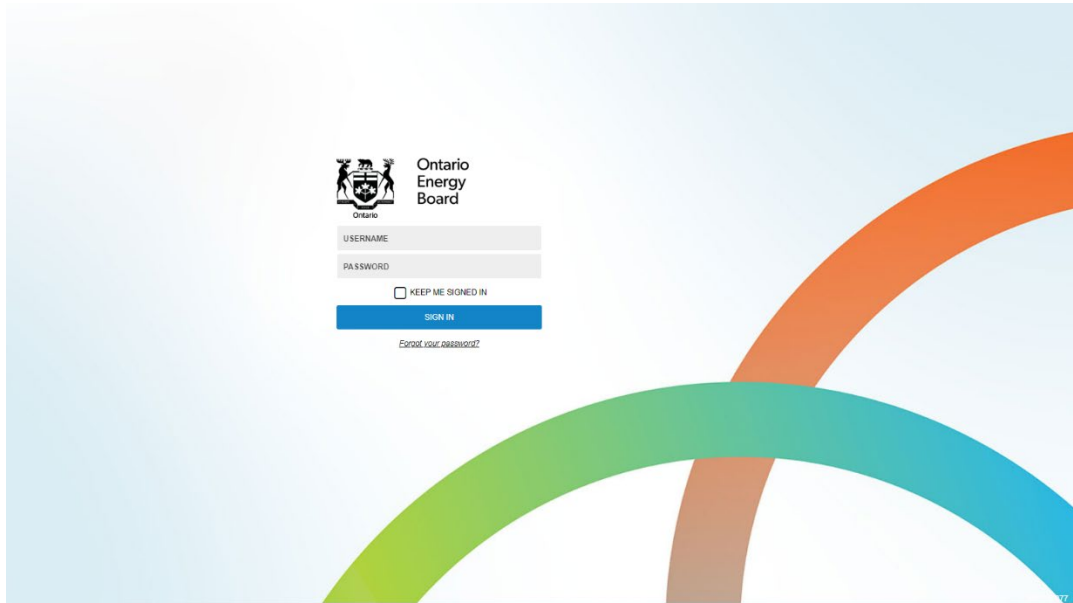
The following users currently have RRR or complaints access on behalf of EPCOR Natural Gas Limited Partnership.

Name	Role
[Redacted]	RRR Filer
[Redacted]	RRR Filer
[Redacted]	RRR Filer
[Redacted]	RRR Filer
[Redacted]	Complaint Contact
[Redacted]	Complaint Contact
[Redacted]	RRR Filer
[Redacted]	RRR Filer
[Redacted]	RRR Filer
[Redacted]	Chief Information Security Officer

## 4. Login and Change Password

The RRR filing system can be accessed through either Microsoft Edge/Internet Explorer 10+ or Chrome 38+. The RRR filing system login webpage is shown in Figure 1.

**Figure 1: RRR filing system Login Page**



### URL

Licensees can add this link (<https://p-pes.ontarioenergyboard.ca/PivotalUX/>) to their preferred browser to access the RRR filing system login webpage.

### Login

Use existing user credentials for e-Filing Services for logging in to RRR filing system.

### Change Password

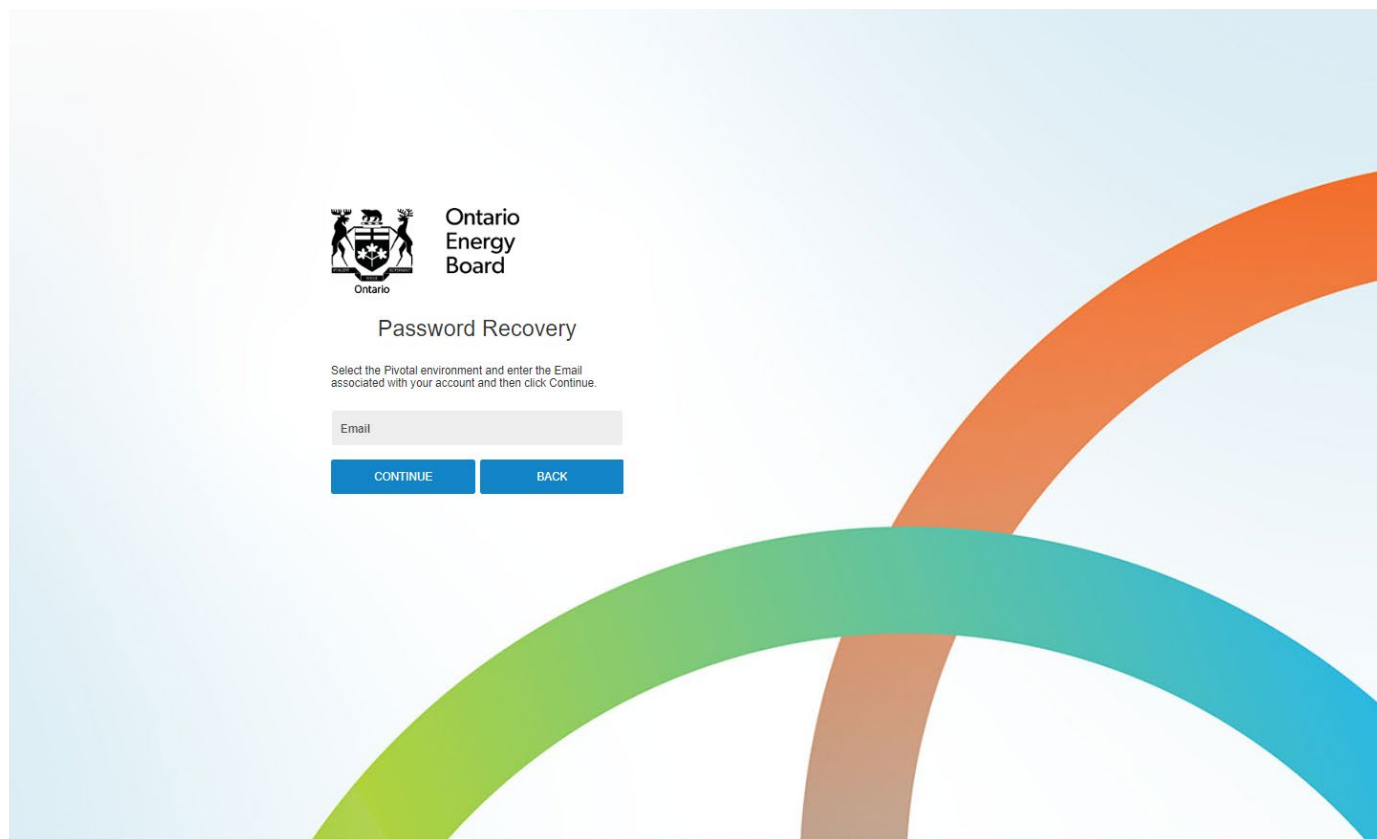
Users can follow these steps to change an existing or renew a forgotten password in RRR filing system.

**Step 1:** Click on “Forgot your Password” on the OEB’s RRR filing system login webpage.

**Step 2:** Enter the email address registered with the OEB as shown in Figure 2.



**Figure 2: Password Recovery Window**



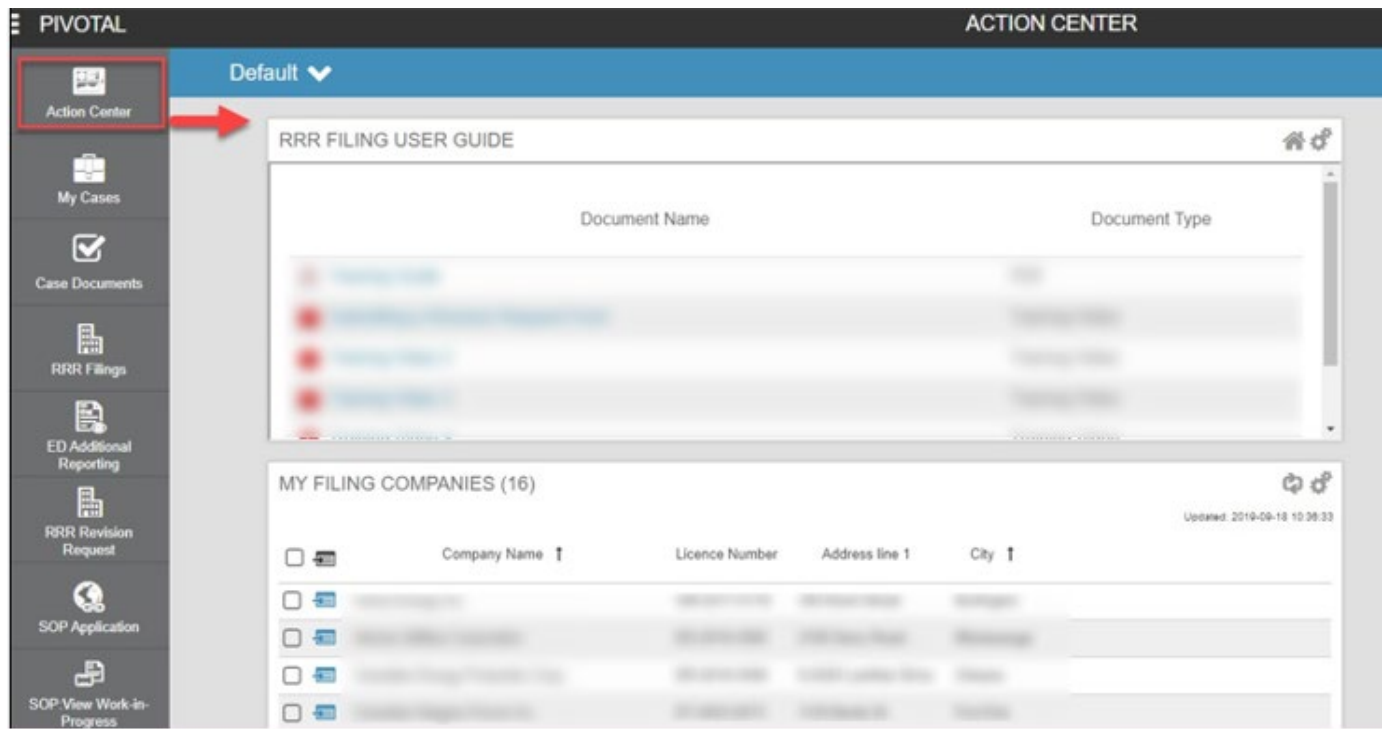
**Step 3:** An email will then be sent to the registered email address containing more information about how to reset the password. Click on the link and change the password.

## 5. Action Center

What is Action Center?

The purpose of Action Center is to provide a short cut for accessing the filing company's name, as well as, accessing all the user support materials. The "Action Center" is the top most button located on the navigation bar, which is explained in the following section.

**Figure 3: Action Center**



## 6. RRR Filings Views

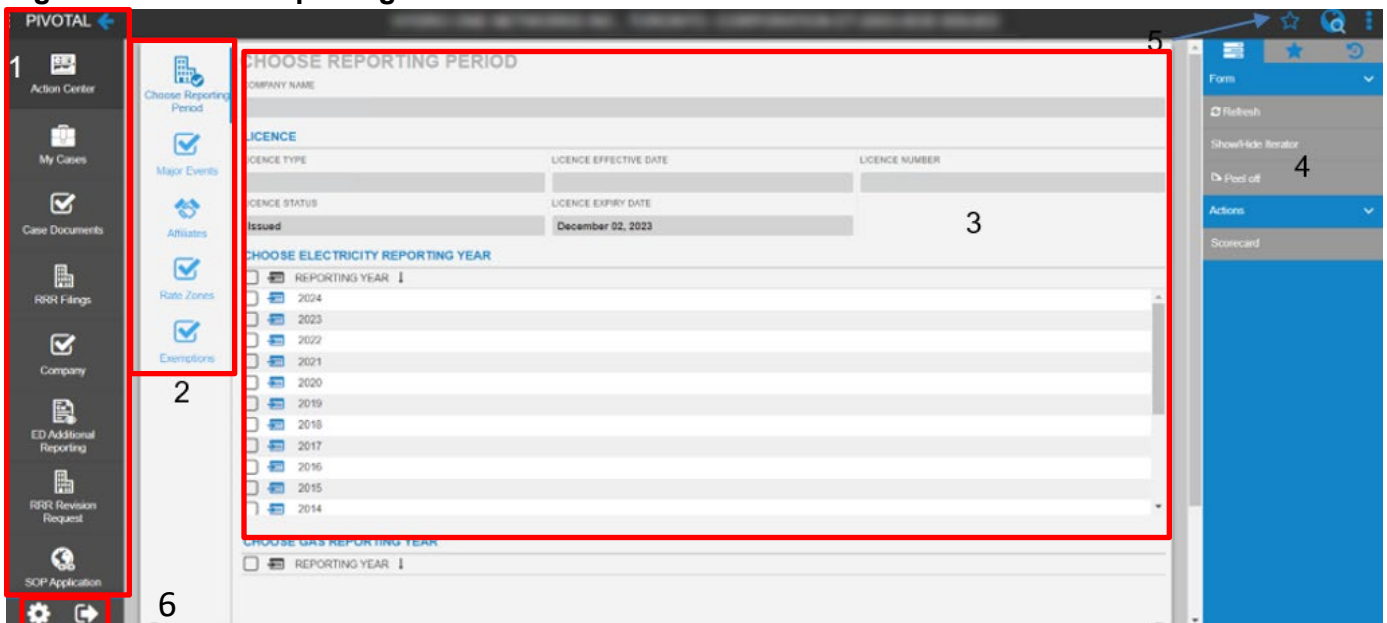
The following section outlines the different views of RRR Filings in RRR filing system.

### 6.1 Choose Reporting Period

After logging in with the registered username and password, click on the “RRR filings” button located on the navigation bar (#1). This will open the Company Details and Reporting Year as shown in Figure 4.

Please note this screen is similar to all license types. The example below shows the Electricity Transmitter license type.

**Figure 4: Choose Reporting Period**



The following are descriptions of the screen sections (1 to 6) shown above.

1. This is navigation bar is present throughout the RRR filings or revision request process. Through this navigation bar users can perform tasks such as RRR filing, RRR revision request, etc. At the top of the navigation bar, there is a feature titled “Action Center”, which allows the users to create a custom dashboard to track any of their RRR data. Additionally, the Action Center also houses demo videos on RRR filing system.
2. This navigation bar features five options: Choose Reporting Period, Major Events, Affiliates, Rate Zones and Exemptions. The options are briefly described below:

Choose Reporting Period: For accessing RRR forms click on “Choose Reporting Period”. This will then prompt the user to click on the desired RRR Reporting Schedule


and finally the annual and quarterly RRR filings. This RRR navigation bar will disappear once the reporting year from the “Choose Reporting Period” is selected.

Please note that ‘Major Events’ and ‘Rate Zones’ is only applicable to electrical distributors and due to this reason, the details of these section have not been included in this filing guide.

**Affiliates:** Clicking on this tab will open affiliate names.

**Exemptions:** Clicking on this tab will open the details about the company’s RRR filing exemptions. Details such as the specific filing exemptions as well as the additional details can be found in the ‘Exemption Comments’ box.

3. This displays the selected company’s information and lists reporting years. Select “Choose Electricity Reporting Year” for accessing RRR forms. As an example select 2023 as Reporting Year for entering annual 2022 data.
4. This menu bar is present throughout the RRR filings or revisions request process. Through this menu bar users can perform tasks such as Add group, Form refresh and Form print.
5. This header is present throughout the RRR filing or revision request process, but will reflect the title of the current layout with information such as distributor name, type, filing year and form status. Notice that on the right hand side of the header there is “Add Favorite” and “Menu” option, whereas, on the left hand side there is “Navigation” and “Back arrow” option.

Note that an icon () appears when the export data feature is selected. Clicking on this “export data” icon will open a sub-window from where the exported data can be downloaded. The “add favorite” feature lets the user create a shortcut of the current view in the menu bar.

6. Right under the menu bar there is the “settings” and “log out” option. Before logging out ensure that the filing is saved and the correct status (“Not Started”, “Work in Progress” or “Submitted”) is displayed.

## 6.2 RRR Reporting Schedule

After selecting a reporting year from “Choose Electricity Reporting Year”, the RRR reporting schedule for the applicable licensee will appear as shown in the figures 5 to 8 below.

**Figure 5: RRR Reporting Schedule – ET**

Filing Name	Status	Submitted On	Sort Order
3.1.1	Revised	January 17, 2023	18
3.1.2	Revised	January 17, 2023	19
3.1.7	Submitted	January 17, 2023	20
E321CERT	Submitted	January 17, 2023	21

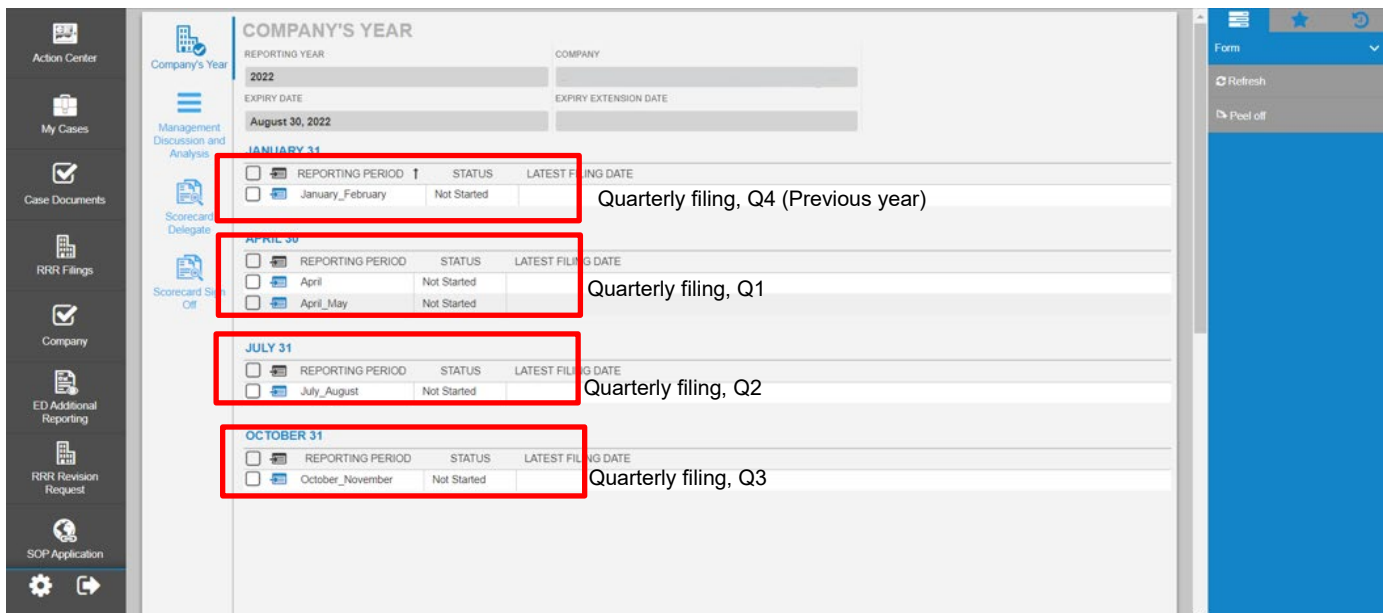
Annual Filing

**Figure 6: RRR Reporting Schedule – USMP**

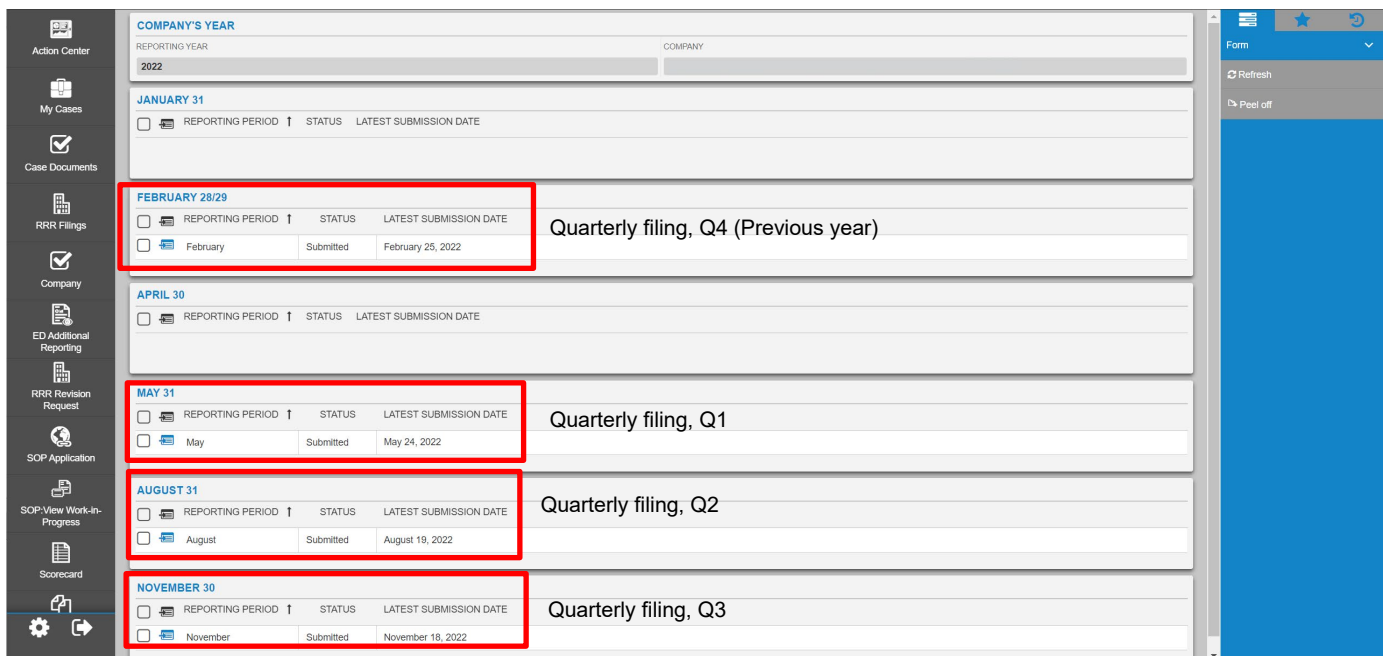
Filing Name	Status	Expiry Date	Sort Order
8.1.1	Not Started	May 03, 2023	22

Annual Filing

**Figure 7 - RRR Reporting Schedule – ER**



**Figure 8 - RRR Reporting Schedule – GM**



7. This section displays the annual and the applicable quarterly reporting periods for the reporting year. This will also show the status of your RRR filings (“Not Started”, “Work in Progress” or “Submitted”) and latest submission date of the particular annual or quarterly RRR filing.

Users can select the folder for the applicable reporting period as follows:

**Electricity Transmitters:**

- The electricity transmitters only have an annual reporting requirement.

**Unit Sub Metering (USMP) Providers:**

- The USMPs only have an annual reporting requirement.

**Electricity Retailers:**

- The **January** folder to report the Q4 filings for the previous year
- The **May** folder to report the annual and Q1 filing for the current year;
- The **July** folder to report the Q2 filing for the current year;
- The **October** folder to report the Q3 filing for the current year.

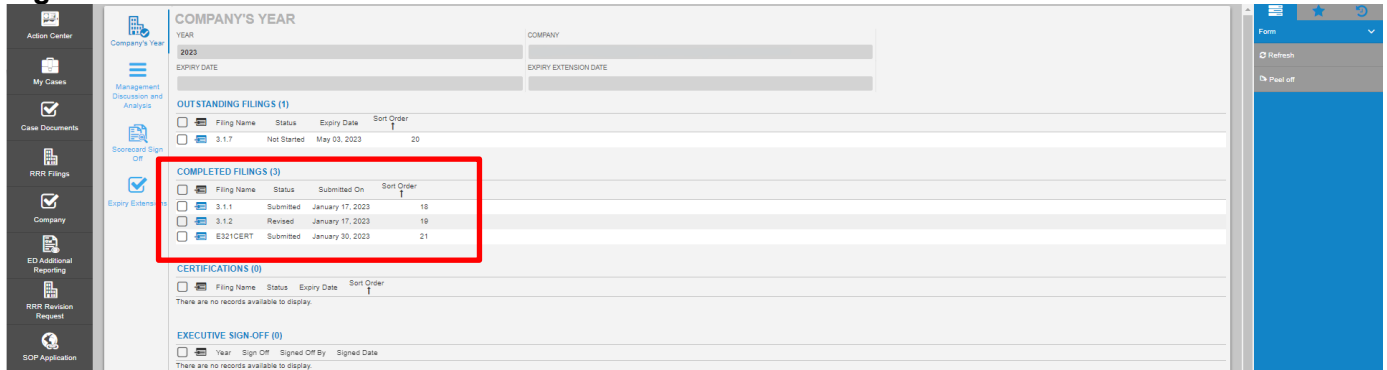
**Gas Marketers:**


- The **February** folder to report the Q4 filings for the previous year
- The **May** folder to report the annual and Q1 filing for the current year;
- The **August** folder to report the Q2 filing for the current year;
- The **November** folder to report the Q3 filing for the current year.

### 6.3. RRR Forms

Once the required annual reporting year or applicable quarterly filing period is selected a screen for RRR filings appears as shown in Figure 9: RRR Forms..

Figure 9: RRR Forms



- This is the section for accessing the desired RRR filing. For example, to show the various annual forms that appear in the RRR Forms Screen, the above screenshot shows the “Annual Transmitter Filing Forms 3.1.2 - 3.1.7” from the RRR navigation bar (Section #2). Clicking on the “enter form” icon (  ) under any of the desired RRR form titles will open the standard form template for entering RRR data.




## 7. Submit RRR Filings

The following section outlines the key activities performed when submitting RRR Filings.

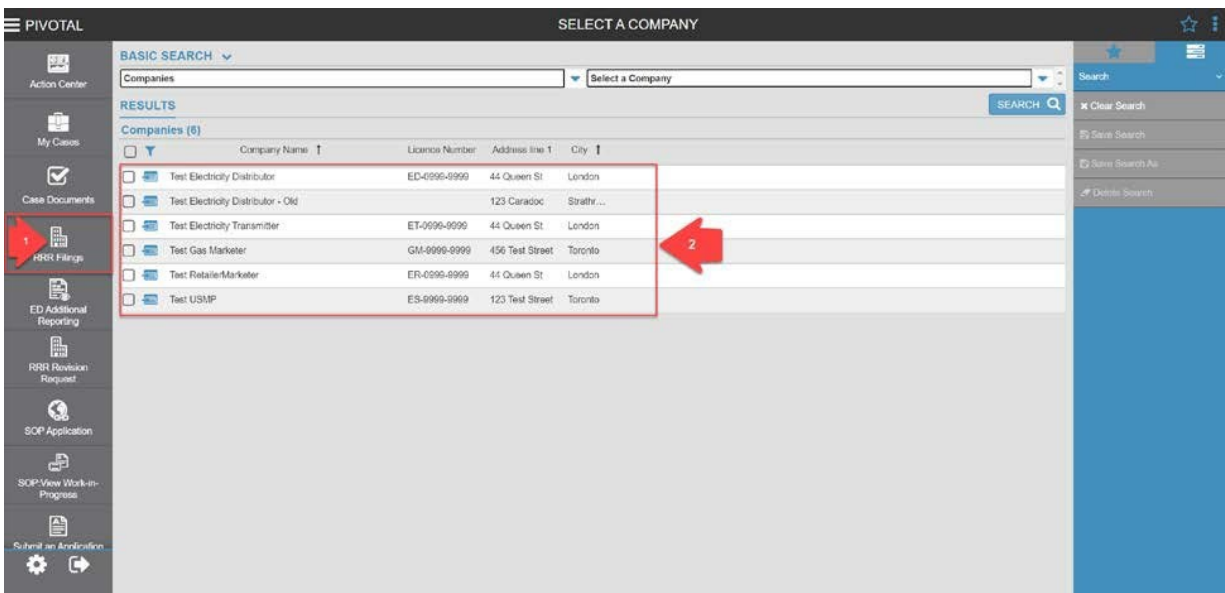
### 7.1 Select Company Name

After logging in, the user has to select a company name from the list of companies:

**Step 1:** On the left-hand column, please select “RRR Filing”.

**Step 2:** From the list of companies, select your company by clicking this icon (  ) against the company name. See Figure 10.

**Figure 10: List of Companies**



## 7.2 Access RRR Forms

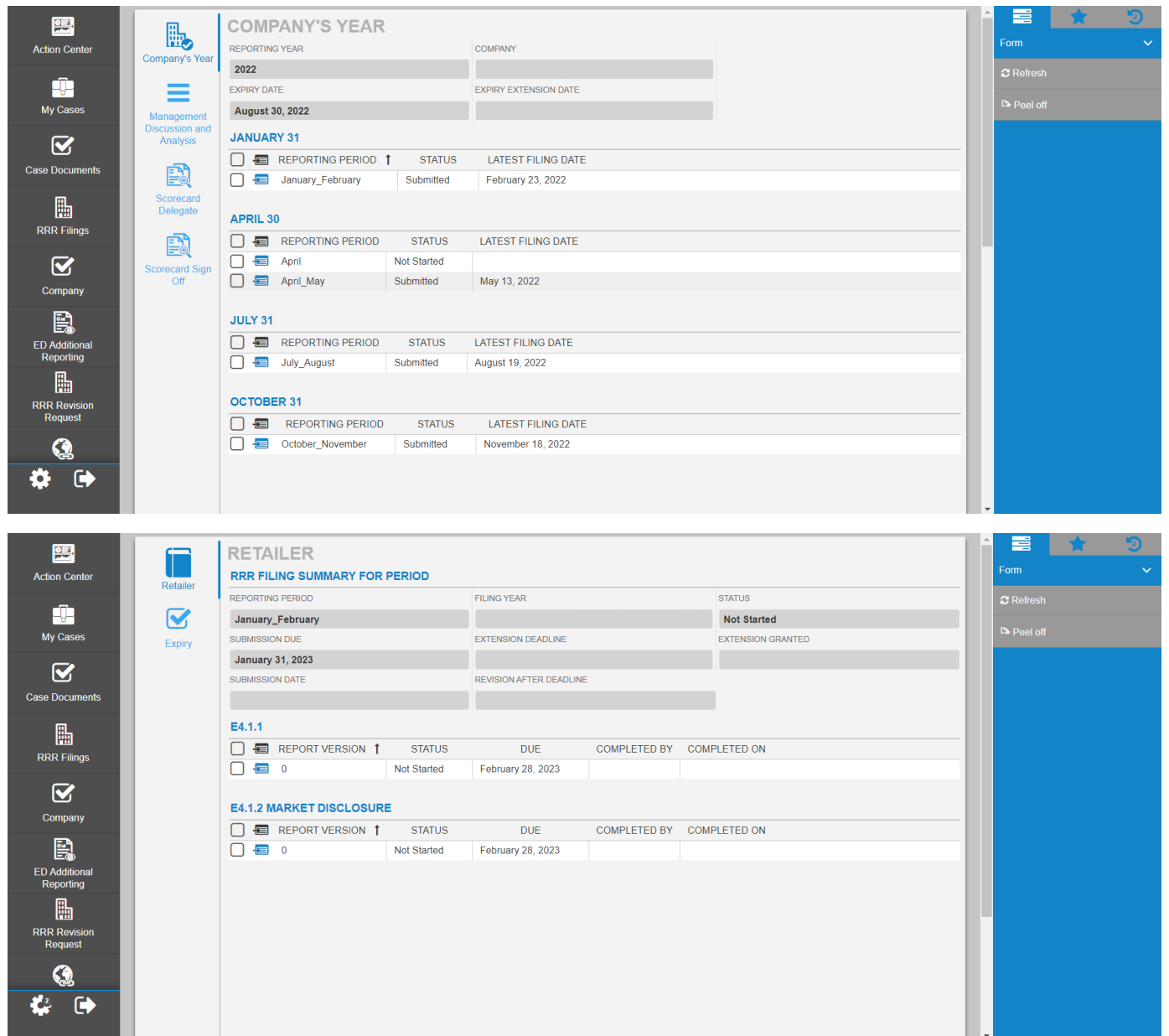
This section provides instructions on assessing the annual and quarterly RRR filings. The examples below cite electricity retailer quarterly and electricity transmitter annual filings. These views are similar for the other licensees in RRR filing system and are based upon the filing schedule.


In order to access any of the quarterly filings, the user will proceed with the following steps (annual filings are shown in the subsequent example):

**Step 1:** Click on “Choose Electricity Reporting Year” as shown in Figure 4 to select reporting year.

**Step 2:** Select the desired filing period from the reporting period menu shown in Figure 12. Depending on the reporting period selected, the corresponding RRR forms would then appear on the RRR Forms Screen as shown in Figure 12. Quarterly periods are indicated by the “Month\_Month” nomenclature reflective of the filing window. The “April” reporting period is reserved for annual filings.

Figure 12: Select Filing Period



**Step 3a:** Click the “enter form” icon (  ) under E4.1.1 form title to access the form as shown in Figure 13.

**Figure 13: Sample Quarterly RRR Reporting Form**

Or,

**Step 3b:** Single click the “enter form” icon (  ) under E4.1.2 form title to access the form shown in Figure 14.

**Figure 14: Sample Annual RRR Reporting Form**

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In order to access any of the annual filings, the user will proceed with the following steps:

**Step 1:** Click on “Choose Electricity Reporting Year” as shown in Figure 4 to select reporting year.


**Step 2:** the corresponding RRR forms would then appear as shown in Figure 15.

**Figure 15: Annual Filing Forms**

The screenshot displays the 'COMPANY'S YEAR' interface. On the left is a navigation sidebar with icons for Action Center, My Cases, Case Documents, RRR Filings, Company, ED Additional Reporting, RRR Revision Request, and settings. The main content area includes:

- COMPANY'S YEAR:** Fields for YEAR, COMPANY, EXPIRY DATE, and EXPIRY EXTENSION DATE.
- OUTSTANDING FILINGS (4):** A table with columns: Filing Name, Status, Expiry Date, Sort Order.
 

<input type="checkbox"/>	Filing Name	Status	Expiry Date	Sort Order
<input type="checkbox"/>	3.1.1	Not Started	May 03, 2023	18
<input type="checkbox"/>	3.1.2	Not Started	May 03, 2023	19
<input type="checkbox"/>	3.1.7	Not Started	May 03, 2023	20
<input type="checkbox"/>	E321CERT	Not Started		21
- COMPLETED FILINGS (0):** A table with columns: Filing Name, Status, Submitted On, Sort Order. Below it, the text reads: "There are no records available to display."
- CERTIFICATIONS (0):** A table with columns: Filing Name, Status, Expiry Date, Sort Order. Below it, the text reads: "There are no records available to display."
- EXECUTIVE SIGN-OFF (0):** A table with columns: Year, Sign Off, Signed Off By, Signed Date. Below it, the text reads: "There are no records available to display."

**Step 3a:** Click the “enter form” icon (  ) under ET3.1.1 form title to access the form as shown in Figure 16.

**Figure 16: Sample Annual Transmitter Reporting Form**


The screenshot shows the 'Sample Annual Transmitter Reporting Form' with the following sections:

- Header:** PIVOTAL logo, navigation arrow, and title "3.1.1; 0; NOT STARTED; ; APRIL".
- Instructions:** "Clicking Checkmark at the top of the page will not automatically submit this filing. To SUBMIT this filing, scroll to the end of the page, select Yes in the Submit drop down then click the Checkmark button. Other Deferral/Variance Accounts".
- REPORT SUMMARY:** A form with fields for:
  - REPORTING YEAR: 2024
  - FILING FORM NAME: 3.1.1
  - RRR FILING NO: [Empty]
  - REPORTING PERIOD AND COMPANY NAME: [Empty]
  - LICENCE TYPE: Transmitter
  - STATUS: Not Started
  - REPORT VERSION: [Empty]
  - EXTENSION GRANTED: [Empty]
  - EXTENSION DEADLINE: [Empty]
  - FILING DUE DATE: [Empty]
  - FISCAL PERIOD FROM: [Empty]
  - FISCAL PERIOD TO: [Empty]
  - SUBMITTED ON: [Empty]
  - SUBMITTER NAME: [Empty]
  - EXPIRY DATE: [Empty]
- DEFERRAL ACCOUNTS:** A table with columns: ACCOUNT, QUARTER OPENING BALANCE DR/-CR, CARRYING CHARGES DR/-CR THIS PERIOD, CARRYING CHARGES DR/-CR TO DATE, NET ACCRUALS DR/-CR THIS PERIOD, NET ACCRUALS DR/-CR TO DATE, OTHER ADJUSTMENT DR/-CR THIS PERIOD, OTHER ADJUSTMENT DR/-CR TO DATE, QUARTER CLOSING BALANCE DR/-CR, TO DATE CHECK, and COMMENT.
 

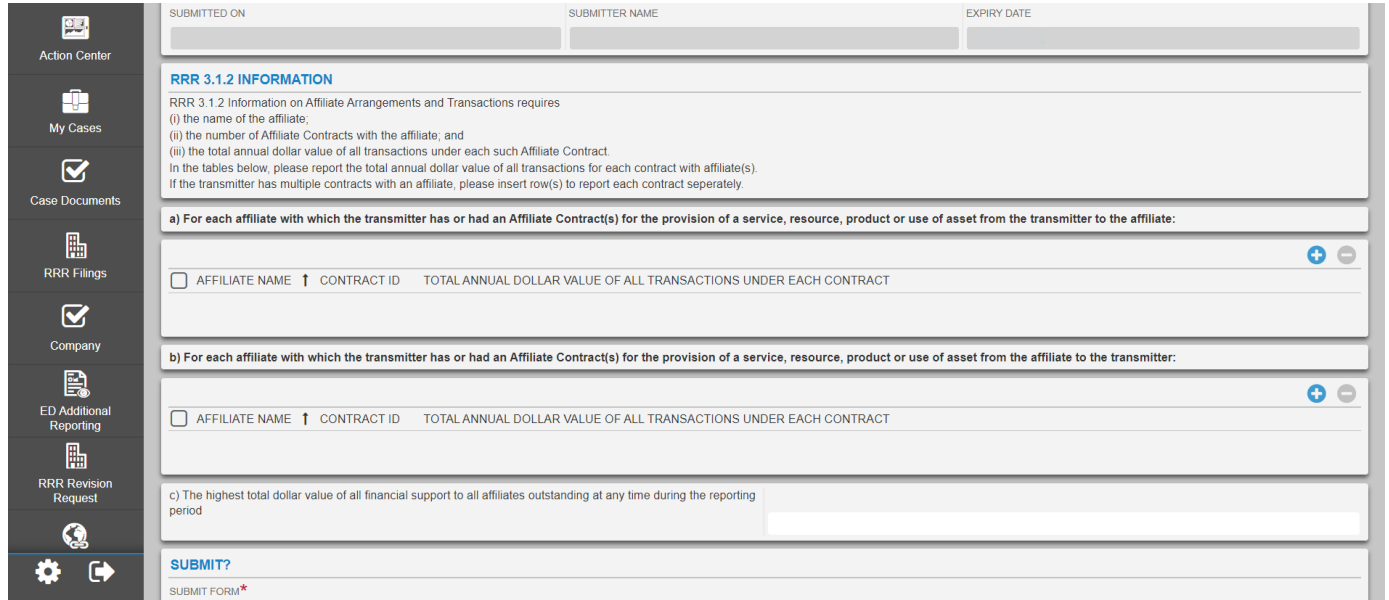
<input type="checkbox"/>	ACCOUNT	QUARTER OPENING BALANCE DR/-CR	CARRYING CHARGES DR/-CR THIS PERIOD	CARRYING CHARGES DR/-CR TO DATE	NET ACCRUALS DR/-CR THIS PERIOD	NET ACCRUALS DR/-CR TO DATE	OTHER ADJUSTMENT DR/-CR THIS PERIOD	OTHER ADJUSTMENT DR/-CR TO DATE	QUARTER CLOSING BALANCE DR/-CR	TO DATE CHECK	COMMENT
<input type="checkbox"/>	1508 Other regulatory assets										
<input type="checkbox"/>	1525 Miscellaneous deferred debit										
<input type="checkbox"/>	1570 Qualifying transition costs										
<input type="checkbox"/>	1572 Extraordinary event costs										

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Or,

**Step 3b:** Single click the “enter form” icon (  ) under ET3.1.2 form title to access the form as shown in Figure 17.

**Figure 17: Sample Annual RRR Reporting Form**



The screenshot displays the RRR Reporting Form interface. On the left is a dark sidebar with navigation icons and labels: Action Center, My Cases, Case Documents, RRR Filings, Company, ED Additional Reporting, RRR Revision Request, and a bottom section with a gear and refresh icon. The main content area has a header with fields for SUBMITTED ON, SUBMITTER NAME, and EXPIRY DATE. Below this is the **RRR 3.1.2 INFORMATION** section, which includes instructions: "RRR 3.1.2 Information on Affiliate Arrangements and Transactions requires (i) the name of the affiliate, (ii) the number of Affiliate Contracts with the affiliate, and (iii) the total annual dollar value of all transactions under each such Affiliate Contract. In the tables below, please report the total annual dollar value of all transactions for each contract with affiliate(s). If the transmitter has multiple contracts with an affiliate, please insert row(s) to report each contract separately." There are two data entry tables: **a) For each affiliate with which the transmitter has or had an Affiliate Contract(s) for the provision of a service, resource, product or use of asset from the transmitter to the affiliate:** and **b) For each affiliate with which the transmitter has or had an Affiliate Contract(s) for the provision of a service, resource, product or use of asset from the affiliate to the transmitter:**. Each table has a header with columns:  AFFILIATE NAME, ↑ CONTRACT ID, and TOTAL ANNUAL DOLLAR VALUE OF ALL TRANSACTIONS UNDER EACH CONTRACT. Below each table is a text input field for **c) The highest total dollar value of all financial support to all affiliates outstanding at any time during the reporting period**. At the bottom is a **SUBMIT?** section with a **SUBMIT FORM\*** button.

### 7.3 Submit and View RRR Filings

The following topic describes the process and features of RRR filing system for entering, saving and submitting RRR forms.

**Step 1:** Access the desired form as per the instructions in the previous topic. In this example, ET3.1.1 Deferral Accounts is selected. The status shows “not started” as per Figure 18.

**Figure 18: View RRR Filing Status**

The screenshot shows a web interface for viewing RRR filing status. On the left is a navigation sidebar with icons for 'Company's Year', 'Management Discussion and Analysis', 'Scorecard Sign Off', and 'Expiry Extensions'. The main content area is titled 'COMPANY'S YEAR' and contains several sections:

- COMPANY'S YEAR:** Includes filters for YEAR (set to 2024), COMPANY, EXPIRY DATE, and EXPIRY EXTENSION DATE.
- OUTSTANDING FILINGS (4):** A table with columns: Filing Name, Status, Expiry Date, and Sort Order. The first row (3.1.1) is highlighted with a red border.
- COMPLETED FILINGS (0):** A section with a table header (Filing Name, Status, Submitted On, Sort Order) and the message 'There are no records available to display.'
- CERTIFICATIONS (0):** A section with a table header (Filing Name, Status, Expiry Date, Sort Order) and the message 'There are no records available to display.'
- EXECUTIVE SIGN-OFF (0):** A section with a table header (Year, Sign Off, Signed Off By, Signed Date) and the message 'There are no records available to display.'

Filing Name	Status	Expiry Date	Sort Order
3.1.1	Not Started	May 03, 2023	18
3.1.2	Not Started	May 03, 2023	19
3.1.7	Not Started	May 03, 2023	20
E321CERT	Not Started		21

**Step 2:** As an example, Figure 19 shows the following features available at the time of entering RRR data before the form is saved.

- Sorting entries for the data entered in any of the columns in the table.
  - Sorting based on data – Click on the column header to select ascending or descending
- The read only column is the Account column in the below example where the user cannot change any fields.
- The system will perform the calculation for calculated fields once the user clicks the “checkmark” button located at the top right hand of the screen, this will save the form.
- The calculated fields in the example below are the “Quarter Closing Balance DR/-CR” and the “To Date Check” where the user must save the form first for the calculations to appear.
- The red flags on the editable fields denotes an unsaved data entry that will disappear once the user clicks the “checkmark” button to save.

**Figure 19: Enter RRR Data**

The screenshot shows a web form titled "3.1.1; 0; NOT STARTED;". It includes a header section with "Transmitter" and "Not Started" labels, and a table for "DEFERRAL ACCOUNTS". The table has columns for "ACCOUNT", "QUARTER OPENING BALANCE DR/-CR", "CARRYING CHARGES DR/-CR THIS PERIOD", "CARRYING CHARGES DR/-CR TO DATE", "NET ACCRUALS DR/-CR THIS PERIOD", "NET ACCRUALS DR/-CR TO DATE", "OTHER ADJUSTMENT DR/-CR THIS PERIOD", "OTHER ADJUSTMENT DR/-CR TO DATE", "QUARTER CLOSING BALANCE DR/-CR", and "TO DATE CHECK". A "SUBMIT?" section is at the bottom with a "SUBMIT FORM" dropdown.

Annotations in red boxes point to various elements:
 

- "Checkmark" for saving the form: points to a checkmark icon in the top right.
- Read-only column: points to the "ACCOUNT" column header.
- Sort column: points to the "Sort Ascending" and "Sort Descending" options in a dropdown menu.
- Unsaved data entry flag: points to a red flag icon above the "NET ACCRUALS DR/-CR THIS PERIOD" column.
- Auto calculated once form is saved: points to the "QUARTER CLOSING BALANCE DR/-CR" column.

**Step 3:** Once fields are completed, the user can save the form as a work-in-progress status. This will also enable the auto-calculations and any red flags within the specified data fields will disappear as per Figure 20.

**Figure 20: Mandatory Field Error Message**

The screenshot shows the "DEFERRAL ACCOUNTS" table with the following data:

ACCOUNT	QUARTER OPENING BALANCE DR/-CR	CARRYING CHARGES DR/-CR THIS PERIOD	CARRYING CHARGES DR/-CR TO DATE	NET ACCRUALS DR/-CR THIS PERIOD	NET ACCRUALS DR/-CR TO DATE	OTHER ADJUSTMENT DR/-CR THIS PERIOD	OTHER ADJUSTMENT DR/-CR TO DATE	QUARTER CLOSING BALANCE DR/-CR	TO DATE CHECK
1508 Other regulatory assets	100.00	200.00	300.00	400.00	500.00	100.00	200.00	800.00	1,000.00
1525 Miscellaneous deferred debit		Red flags disappear							
1570 Qualifying transition costs									
1572 Extraordinary event costs									
1574 Deferred rate impact amounts									
2425 Other deferred credits									
2405 Other Regulatory Liabilities									
1592 PILS and Taxes Variances									

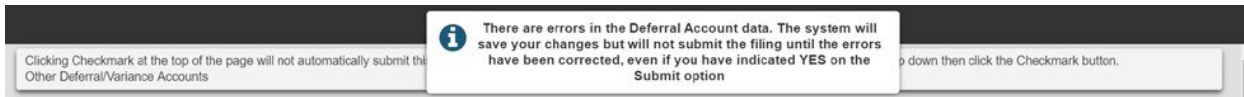
Annotations in red boxes point to:
 

- A red arrow pointing to the "CARRYING CHARGES DR/-CR THIS PERIOD" cell for account 1508.
- The text "Red flags disappear" in the "CARRYING CHARGES DR/-CR THIS PERIOD" column for account 1525.
- The text "Calculated fields" with an arrow pointing to the "QUARTER CLOSING BALANCE DR/-CR" and "TO DATE CHECK" columns for account 1508.

**Step 4:** RRR filing system has embedded data validation checks within the forms. If a user attempts to submit a form with data validation errors or missing entries, RRR filing system will display a pop-up flag to indicate the issue(s) that needs to be resolved. See Figure 21 for an example.



### Figure 21: Validation Rules



**Step 6:** Select “Yes” in the dropdown menu for submit form and then click checkmark to submit the form. See Figure 22.

### Figure 22: Submit RRR Filing Form

A screenshot of a form section titled "SUBMIT?". Below the title is a dropdown menu labeled "SUBMIT FORM\*" with a red asterisk. The dropdown is currently set to "No" and has a blue downward arrow on the right side.

## 7.4 Export Data or Reports and Print Functions

This section outlines the key steps to export select RRR data or reports from submitted forms. Users can either export select data or generate specified report(s) available in various formats to export to the user’s computer. A print function is also available to print RRR forms or select pages.

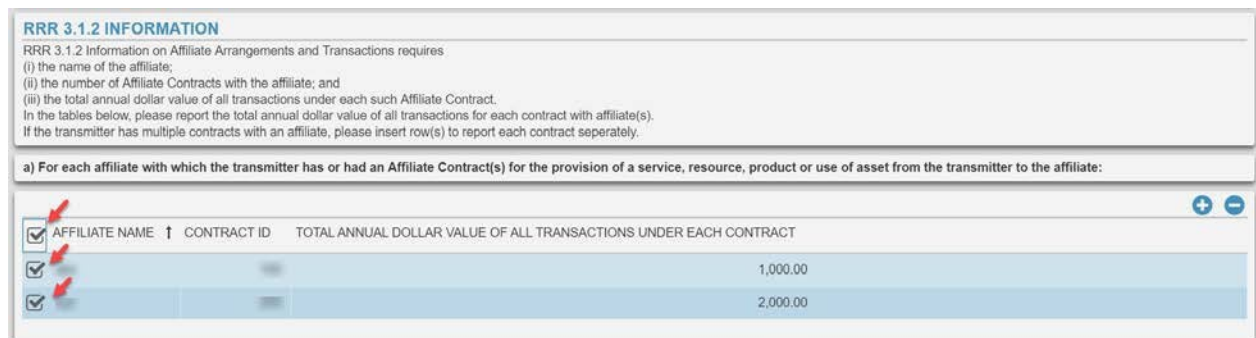
### 7.4.1. Export data:

In order to export data to MS Excel using the export feature, the user will proceed with the following steps:

**Step 1:** Open the desired RRR form and scroll to the desired table containing the data to be exported.

**Step 2:** Move the pointer over the selection box located on the header of the first column of the table and click on it to select all the row entries (Note: you can make a custom selection by individually selecting or deselecting the rows from the first column). See Figure 23.

**Figure 23: Selection Box**



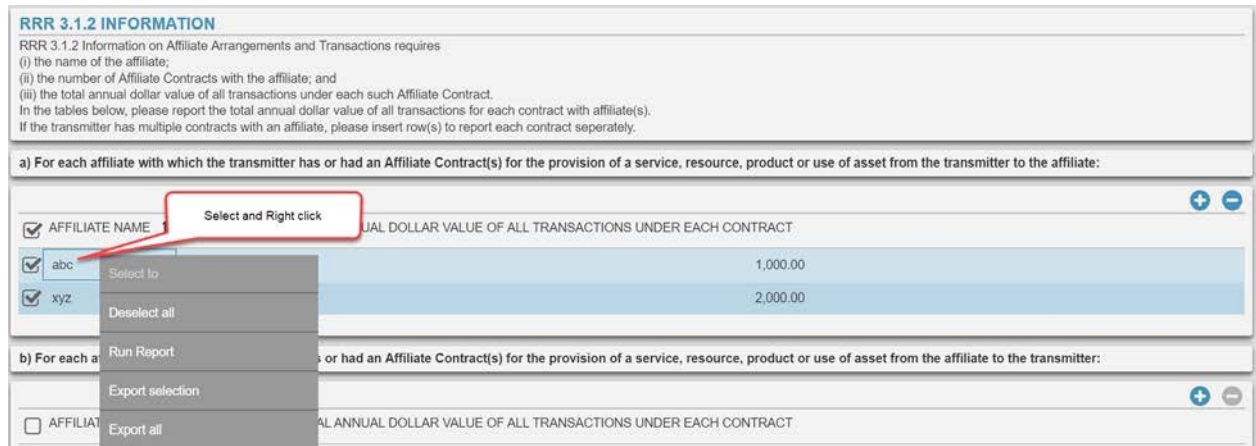
**RRR 3.1.2 INFORMATION**  
RRR 3.1.2 Information on Affiliate Arrangements and Transactions requires:  
(i) the name of the affiliate;  
(ii) the number of Affiliate Contracts with the affiliate; and  
(iii) the total annual dollar value of all transactions under each such Affiliate Contract.  
In the tables below, please report the total annual dollar value of all transactions for each contract with affiliate(s).  
If the transmitter has multiple contracts with an affiliate, please insert row(s) to report each contract separately.

a) For each affiliate with which the transmitter has or had an Affiliate Contract(s) for the provision of a service, resource, product or use of asset from the transmitter to the affiliate:

<input checked="" type="checkbox"/>	AFFILIATE NAME ↑	CONTRACT ID	TOTAL ANNUAL DOLLAR VALUE OF ALL TRANSACTIONS UNDER EACH CONTRACT
<input checked="" type="checkbox"/>			1,000.00
<input checked="" type="checkbox"/>			2,000.00

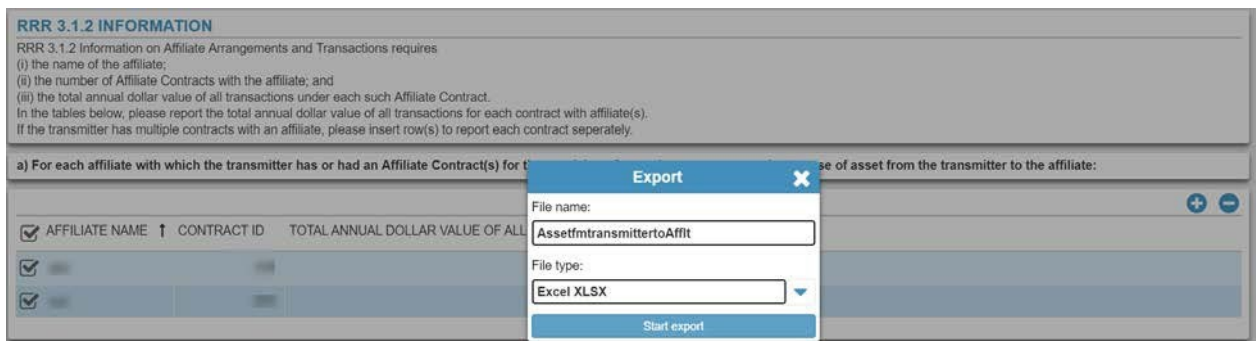
**Step 3:** Once the desired entries have been selected, right-click anywhere inside the highlighted table to open the menu with options such as “export selection”, “export all”, etc. See 2.


**Figure 24: Export Selection**



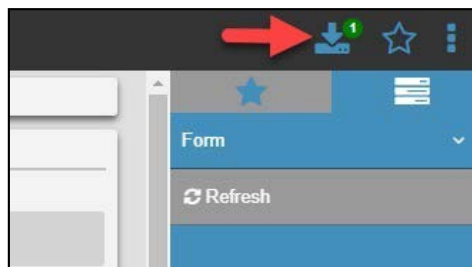
**Step 4:** Upon selecting the desired option (export selection in this example), the user can then assign a preferred file name and select a file type such as .XLSX, .CSV or .XML. See Figure 25.

**Figure 25: Export File**



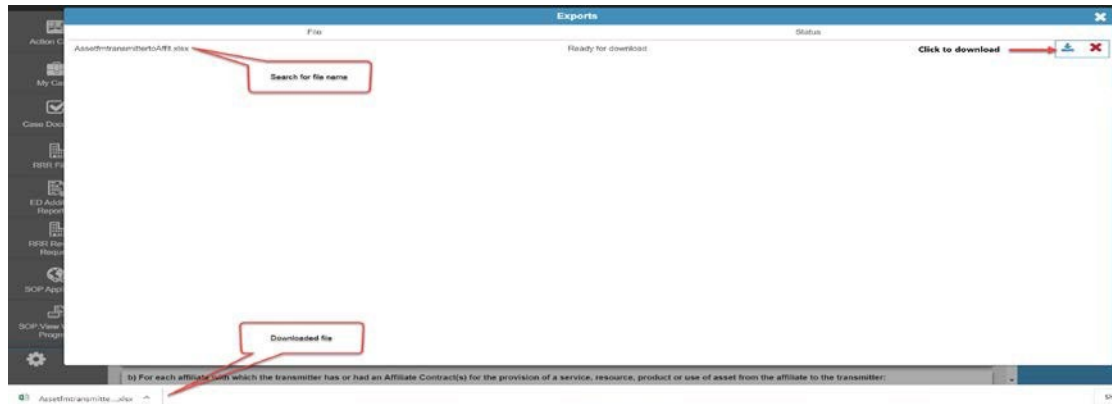
**Step 5:** Note a special icon (  ) that becomes visible on the top right of the screen. This is the location where all export data queries are saved for further download. Click on the “export data” icon to view and download the exported files, as show in Figure 26.

**Figure 26: Export File Download**



**Step 6:** A window with all export file requests will open on the screen. Move the pointer over the download icon (on the right hand side) and click to start the download. The selected data is now exported in the desired file format on the user’s computer. See Figure 27.

**Figure 27: Export File Lookup**



### 7.4.2. Export Report

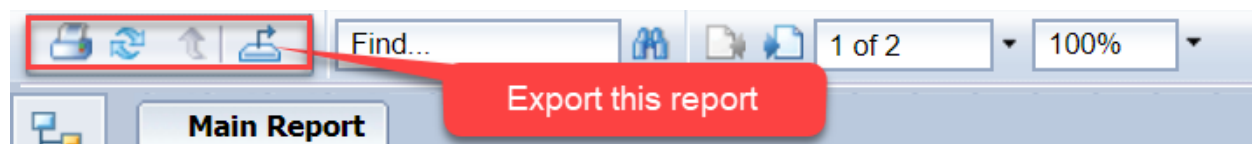
The user can export submitted RRR forms (or select pages) by following procedures similar to those discussed in the export data section above.

The RRR filing system allows the users to save and export desired RRR form(s) in a specified file format to their computers:

**Step 1:** Open the desired RRR form using the RRR filing system navigation bar and then select the desired RRR form.

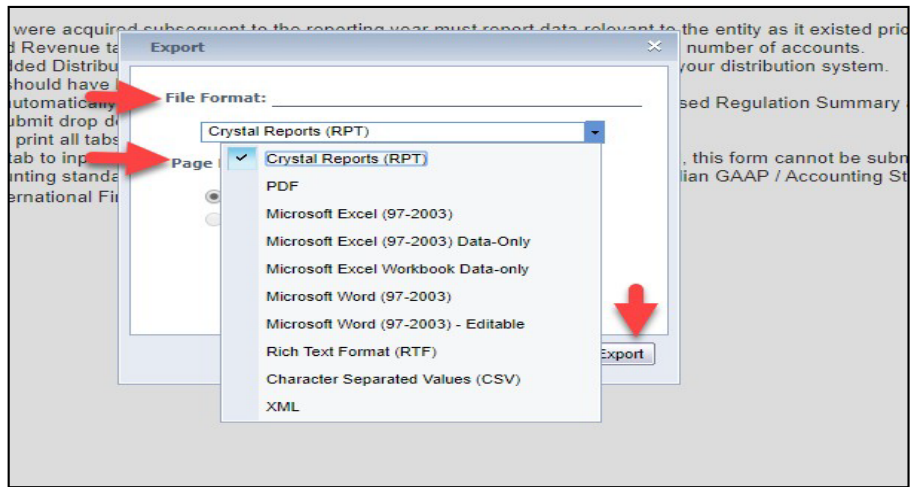
**Step 2:** Located on the right, the menu bar includes a “Print” button. Through the Print button, the user can create a report for a selected form by clicking on “export this report”. See Figure 28. If the right menu bar is not visible, click the icon resembling 3 vertical dots; this toggles the menu on and off.

**Figure 28: Export Selection**



**Step 3:** In the report window, click on the “export this report” icon. This will open a window with a dropdown selection for the desired file format and custom page range. The RRR filing system supports exporting to the following file formats: PDF, RPT, RTF, XML, CSV and MS Word version. See Figure 29.

**Figure 29: Export Report Formats**



### 7.4.3. Print Report

RRR filing system print feature allows the users to print RRR forms (or select pages):

**Step 1:** Open the desired RRR form using the UX navigation bar and then select the desired RRR form page(s).

**Step 2:** Located on the right, the menu bar includes “Print” button. If the right menu bar is not visible, click the icon resembling 3 vertical dots; this toggles the menu on and off. See Figure 30.

**Figure 30: Print Report**



**Step 3:** In the report window, the user will click on the printer icon to generate a PDF file for printing. See Figure 31.

**Figure 31: Print Selection**



## 8. RRR Revision Request

Please refer to [User Guide for Web-based RRR Data Revision Requests \(pdf\)](#)

## 9. Frequently Asked Questions (FAQS)

1. **Can I use my existing e-Filing Services login credentials to enter the RRR filing system?**

Yes, the login and password remain valid. RRR filing system, allows the users to also renew or change the password at their end. For further instructions, please follow [section 4](#) of the guide.

2. **Will the e-Filing Services portal cease to exist once the RRR filing system goes live?**

Yes. The e-Filing Services will be deactivated once RRR filing system goes live.

3. **I want to view my previous RRR filing submissions. Will the RRR filing system be able to show me all my earlier filings?**

Yes. All the previous year's RRR filings have moved to RRR filing system and accessible by registered users. Please contact [IThelp@oeb.ca](mailto:IThelp@oeb.ca) for assistance if you have any difficulties accessing your historic data.

4. **I want to submit a data revision for a form that I submitted in e-Filing Services. Can I submit a Data Revision Request for a filing that was done on e-filing services?**

Yes. All previously reported data is carried over to RRR filing system.

5. **Will the RRR filing system auto save my work-in-progress?**

No, but the forms can be saved manually. Once an incomplete form is saved, the status will be shown as work-in-progress. For further instructions, please follow [section 7.3](#) of the guide.

6. **Why am I unable to save a work-in-progress form?**

Before saving a work-in-progress form please ensure that all the mandatory fields marked with red asterisk (\*) are filled. Once all the mandatory fields are entered, click on the "checkmark" icon to save your work-in-progress form. For further instructions, please follow [section 7.3](#) of the guide.

7. **While entering data I see a red mark on the data entry cells. Is this an error message?**

A red mark displayed on data entry cells indicate that the data is not yet saved. The red mark will disappear once the form is saved by clicking the "checkmark" icon.

8. **How do I distinguish between a read only and writeable cell in the RRR filing system?**

A read only cell (either fixed or auto-calculated field) has a grey background colour, whereas, an editable cell has a white background colour. Within a table, a calculated cell has the column header in a grey background colour.

**9. How do I view the auto-calculated fields once I enter data in the editable fields?**

To view these fields, you will need to save the work-in-progress in your form to allow the system to run background calculations in order to display results in the auto-calculated fields.

**10. How do the auto-calculated fields show the calculated output once the data is entered?**

To view these fields, you will need to save the work-in-progress in your form to allow the system to run background calculations in order to display results in the auto-calculated fields.

**11. I want to select text and data to copy and paste in a document for my use. Is there a way I can copy the data entered in UX?**

The RRR filing system interface features an export function that allows for the extraction of the data selected by the user. Upon selection, the data can be extracted and saved in multiple user-friendly formats for exporting. For further instructions, please follow [section 7.4](#) of the guide.

**12. I want to print a form. What should I do?**

Use the print function located in the menu section of RRR filing system for printing forms. For further instructions, please follow [section 7.4.3](#) of the guide.

**13. After clicking export the following pop up appears on the screen, “Your export <filing title.xlsx> is ready for download”. I want to know where the exported file is saved in the system for download?**

Once “Start Export” is clicked, the selected data is then saved in the exports tab located at the top right side of the window. Click on the exports tab to view any current and previously exported selections available for download in the desired format. For further instructions, please follow [sections 7.4.1 and 7.4.2](#) of the guide for instructions on exporting data and exporting reports, respectively.

**14. Have general IT related questions?**

For any general IT related questions, please get in touch with OEB’s IT Help at [IThelp@oeb.ca](mailto:IThelp@oeb.ca)



## 10. Legend



Action Center



Mandatory field



Add attachment



Menu Option (Show/Hide)



Add/Remove row



Navigation Option (Show/Hide)



Back button



Save data (checkmark) and Cancel data



Enter form (single click)



Selection (export data/order rows)



Export data



Logout



Favourite (Add/Remove)



Unsaved data entry