



Ontario
Energy
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de l'énergie
de l'Ontario

USER GUIDE FOR SUBMITTING INTERVENOR COST CLAIMS

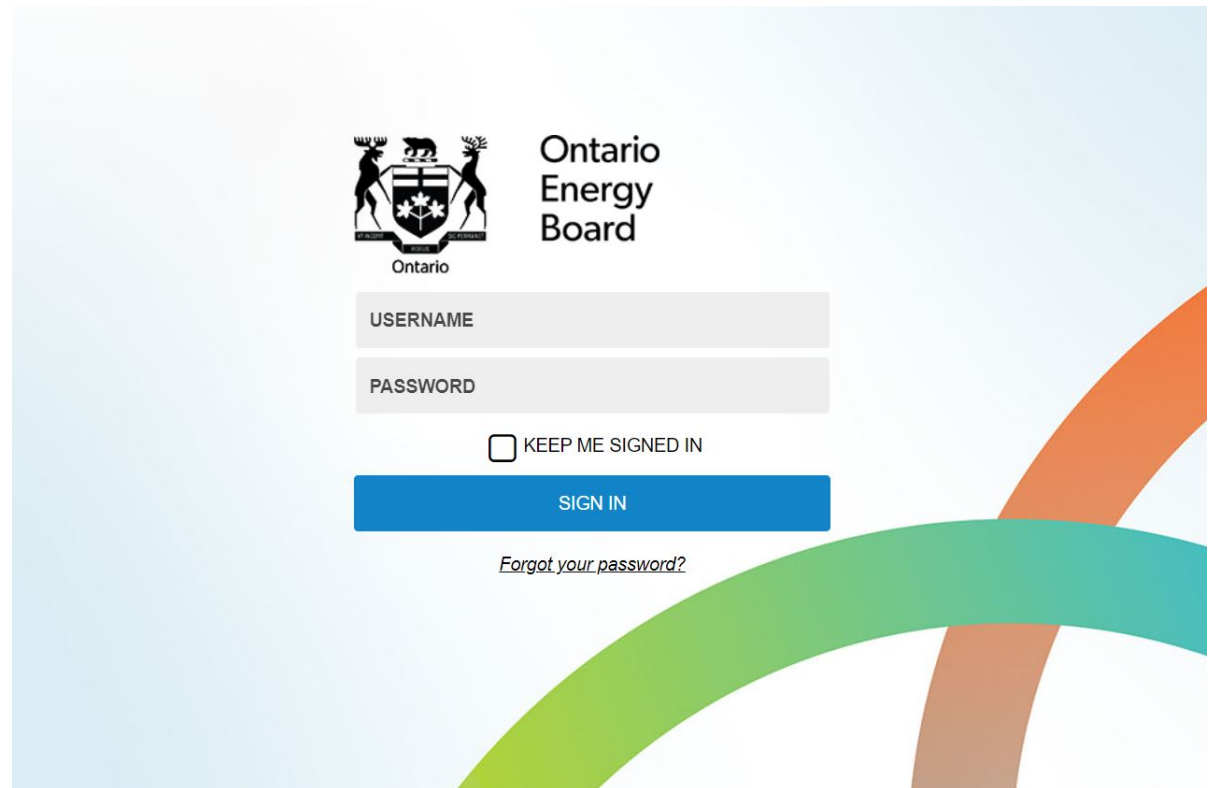
Last updated: March 15, 2022

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1. LOGGING INTO UX:

- Use the link <https://pes.ontarioenergyboard.ca/PivotalUX/> to log into UX.
- The Intervenor Cost Claim application can also be accessed on oeb.ca's [File documents online](#) webpage.
- Enter your Username and Password.



Ontario Energy Board

Ontario

USERNAME

PASSWORD

KEEP ME SIGNED IN

SIGN IN

[Forgot your password?](#)

2. DASHBOARDS:

- Logging into the application will open the **Action Centre**.
- The **Intervenor Dashboard** displays four default portals.
 - **Cost Claim Cases**
 - **In Progress Cost Claims**
 - **Submitted Cost Claims**
 - **Finance Approved Cost Claims**



Select the '+' icon on the far right to view a specific portal.



To customize a dashboard, e.g., to expand a row or rows, or specify how often the portal will refresh, select the 'settings' icon.

The screenshot shows the PIVOTAL ACTION CENTER interface for an Intervenor. The dashboard is divided into four main sections, each with a refresh and settings icon:

- Cost Claim Cases (3)**: Updated: 2022-02-04 13:48:18. Table with columns: Case Number, Applicant, App Sub. Includes rows for TEST - ABC and Ontario Ener...
- In Progress Cost Claims (5)**: Updated: 2022-02-04 13:48:18. Table with columns: Cost Claim #, EB#, Phase #, Su De. Includes rows for EB-2022-001... and EB-2022-002...
- Submitted Cost Claims (1)**: Updated: 2022-02-04 13:48:18. Table with columns: Cost Claim #, EB#, Phase #, Su De. Includes row for 850 EB-2022-001...
- Finance Approved Cost Claims (1)**: Updated: 2022-02-04 13:48:18. Message: "There are no records available to display."

This screenshot shows the 'Cost Claim Cases (3)' portal expanded. The table includes the following columns: Case Number, Applicant, Application Submission Status, Case Status, Phase, and Submission Deadline.

Case Number	Applicant	Application Submission Status	Case Status	Phase	Submission Deadline
EB-2022-0...	TEST - ABC ...	Proceed	Open	1	February 28, 2022
EB-2022-0...	Ontario Ener...	Proceed	Open	1	February 25, 2022
EB-2022-0...	Ontario Ener...	Proceed	Open	1	February 04, 2022

3. INTERVENOR DASHBOARD – PORTALS:

3.1 Cost Claim Cases

1 The cases an intervenor is eligible to file a cost claim against will appear in this portal.

Click on the blue icon to the left of the **EB#** or **Cost Claim #** to select a record to process.

3.2 In Progress Cost Claims

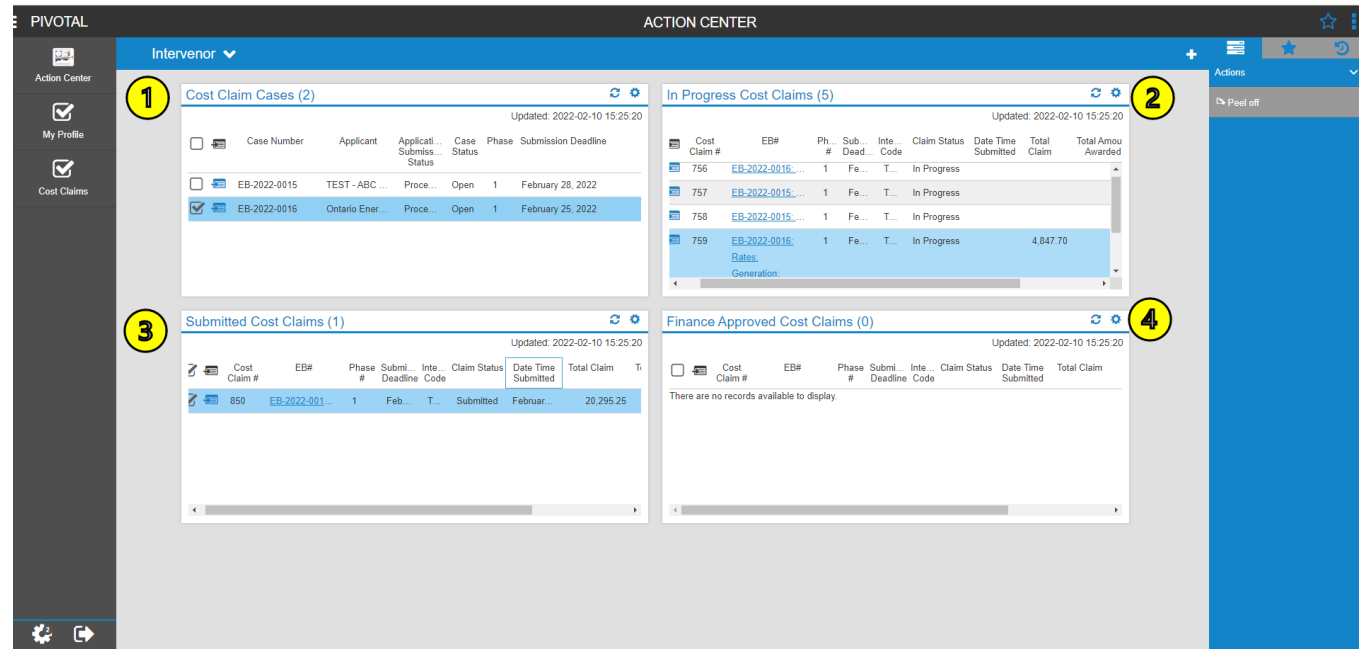
2 Once a cost claim has been created and saved, it will appear in the **In Progress Cost Claims** portal.

3.3 Submitted Cost Claims

3 Claims submitted to OEB will appear in **Submitted Cost Claims** portal.

3.4 Finance Approved Cost Claims

4 OEB-approved cost claims appear in this portal. **Total Amount Awarded** will display once it's been entered in the system.



4. MY PROFILE

- Setting up a profile is a one-time step for intervenors or administrative staff entering claims on behalf of intervenors.
- The information is specific to the intervenor and eliminates the need to re-enter the same information for subsequent cost claims.
- Administrative staff filing on behalf of an intervenor(s) do not need to complete the **Intervenor** section but will need to enter a **PAYMENT ADDRESS**.
- Select **My Profile**

The screenshot displays the PIVOTAL mobile application interface. On the left, a dark sidebar contains navigation options: 'Action Center', 'My Profile' (highlighted with a yellow box), 'Cost Claims', and a settings/refresh icon at the bottom. The main content area is titled 'PIVOTAL' and features a 'USER DETAILS' section with input fields for 'FIRST NAME', 'LAST NAME', 'COMPANY NAME', and 'JOB TITLE'. Below this is an 'ACCOUNT DETAILS' section with fields for 'EMAIL', 'PHONE', 'FAX', and 'EXT'. At the bottom of the main content area, there is a table with columns for 'COMPANY' and 'ROLE', and a checkbox. On the right side, a blue sidebar contains a 'Form' dropdown menu, a 'Refresh' button, and a 'Peel off' button.

- Scroll down to the **INTERVENOR** section

- Select **SERVICE PROVIDER TYPE** from the dropdown list (*Legal Counsel, Articling Student/Paralegal, Consultant, Analyst*)
 - Enter the **YEAR CALLED TO BAR** if applicable
 - Enter **COMPLETED YEARS** (*The system will use this to populate the appropriate hourly rate.*)
- **PAYMENT ADDRESS**
 - This section can include multiple addresses – e.g., the intervenor’s and those of clients.
 - The address selected as the primary address will be the default and can be changed as needed.
 - **CV’S** - pertains to consultants in a proceeding. It displays the last time a CV was uploaded to the system.
 - The system will prompt for an update if the version on file is more than two years old at the time a cost claim is submitted.

INTERVENOR

SERVICE PROVIDER TYPE	YEAR CALLED TO BAR	COMPLETED YEARS
Legal Counsel	1991	30

CV'S

ATTACHMENT	DATE UPLOADED
<input type="checkbox"/>	

PAYMENT ADDRESSES

ADDRESS LINE 1	ADDRESS LINE 2	CITY	PROVINCE	POSTAL CODE	INTE... PRIM...
<input type="checkbox"/> 2300 Yonge Str...		Toronto	ON	M3B 3S5	<input checked="" type="checkbox"/>
<input type="checkbox"/> 123 Main Street		Ajax	ON	P3I 7S7	<input type="checkbox"/>

5. COST CLAIM LAYOUT

Case Level

- This is the screen displayed after a case is selected from the **Cost Claim Cases** dashboard.
 - All cost claims that have been entered for that case will be listed here.
 - If you represent multiple intervenors for the same case, those claims will appear in the list.

PIVOTAL EB-2022-0015: RATES: GENERATION: TEST - ABC LIMITED COMPANY

CASE

EB-2022-0015: Rates: Generation: TEST - , PHASE 1, CASE STATUS Open

APPLICATION TYPE: Rates, INITIAL APPLICATION RECEIVED DATE: December 31, 2020, APPLICANT: TEST - ABC Limited Company, Toronto: Cc

COST CLAIM SUBMISSION DEADLINE: February 28, 2022

COST CLAIMS

INTERVENOR	INTERVENOR COMPANY	PHASE #	SUBMISSION DEADLINE	CLAIM STATUS	TOTAL AMOUNT AWARD
Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submitted	
Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submitted	
Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submitted	
Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submitted	
Ramsay, Lynn; +1 (416) 481-1967 lyn...	TEST - ABC Limited Compan...	1	February 28...	In Progress	
Ramsay, Lynn; +1 (416) 481-1967 lyn...	TEST - ABC Limited Compan...	1	February 28...	In Progress	

Form, Refresh, Peel off, Actions, Create Cost Claim

Header Level

The **Cost Claim** header encompasses the individual cost claims for each participant and replaces the *Affidavit* and *Summary of Fees and Disbursements*.

This is the form that is submitted to the OEB when all the individual participant cost claims have been completed.

Comprised of five sections (grids)

- 1 Cost Claim Header
- 2 Participants
- 3 Attachments
- 4 Cost Claim Summary
- 5 Submit

Cost Claim Header

The screenshot shows the PIVOTAL interface for a cost claim. The header includes the case number 'EB-2022-0015 : 1 : TEST PARTICIPANT'. The form is divided into five numbered sections:

- Section 1: Cost Claim Header** - Contains fields for COST CLAIM NUMBER (737), SUBMISSION DEADLINE DATE (February 28, 2022), CLAIM STATUS (Submitted), EB#, OTHER EB#, PHASE # (1), INTERVENOR / FILER (Participant, Test: +(j416-786-0987 test.participant@oeb.cax)), INTERVENOR COMPANY* (TEST - ABC Limited Company, Toronto: Corporat), INTERVENOR TYPE (Full Registrant), HST RATE ONTARIO (13.00), EXCHANGE RATE, COUNTRY, HST NUMBER (1234567890), LATE SUBMISSION ALLOWED, and EXTENSION DEADLINE DATE.
- Section 2: PARTICIPANTS** - A table with columns for NEW, NON-FILING PARTICIPANT, FILING PARTICIPANT, TOTAL (\$), and PARTICIPANT CLAIM STATUS. It lists two participants: 'Participant, Test: +(j416-786-0987 test.participant@oeb.cax)' with a total of 2,906.30 and 'John Smith' with a total of 1,488.37, both with a status of 'Submitted'.
- Section 3: ATTACHMENTS** - A table with columns for DOCUMENT TYPE, ATTACHMENT, and IMPORT MESSAGE. It shows one attachment: 'TABC EB-2022-0015 Cost Claim 011320221502.pdf'.
- Section 4: Cost Claim Summary** - A summary table with columns for TOTAL LEGAL/CONSULTANT/OTHER FEES (3,730.00), TOTAL DISBURSEMENTS (167.94), and TOTAL HST (506.73). It also includes fields for TOTAL CLAIM (4,404.67), REASON FOR DISALLOWANCE, and MAKE CHEQUE PAYABLE TO (Leslie Participant).
- Section 5: SUBMIT SECTION** - A text area containing a declaration: 'I am a representative of the Party. I have examined all of the documentation in support of this cost claim. The costs incurred and time spent are directly related to the Party's participation in the OEB Process referred to above. This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in section 6.05 and 6.09 of the OEB's Practice Direction on Cost Awards. The information (fees and disbursements) filed in this cost claim is complete and accurate and in accordance with the OEB's Practice Direction for Cost Awards and Appendix A, the Cost Awards Tariff.' Below this is a table with columns for SUBMITTED BY (Leslie Participant) and DATE SUBMITTED (January 13, 2022).

Cost Claim Header Grid

1 The **COST CLAIM NUMBER** appears here as well as the **INTERVENOR COMPANY** that the cost claim is entered on behalf of.

The system will populate the header with information specific to the case and the intervenor.

The status of the cost claim is also shown here – either ‘**In Progress**’, ‘**Submitted**’ or ‘**Approved by Finance**’.

Participant Grid

2 Lists all participants claiming costs, with the total dollar amount claimed and the **PARTICIPANT CLAIM STATUS**. All participants must have a claim status of ‘**Submitted**’ before the entire cost claim can be submitted to the OEB.

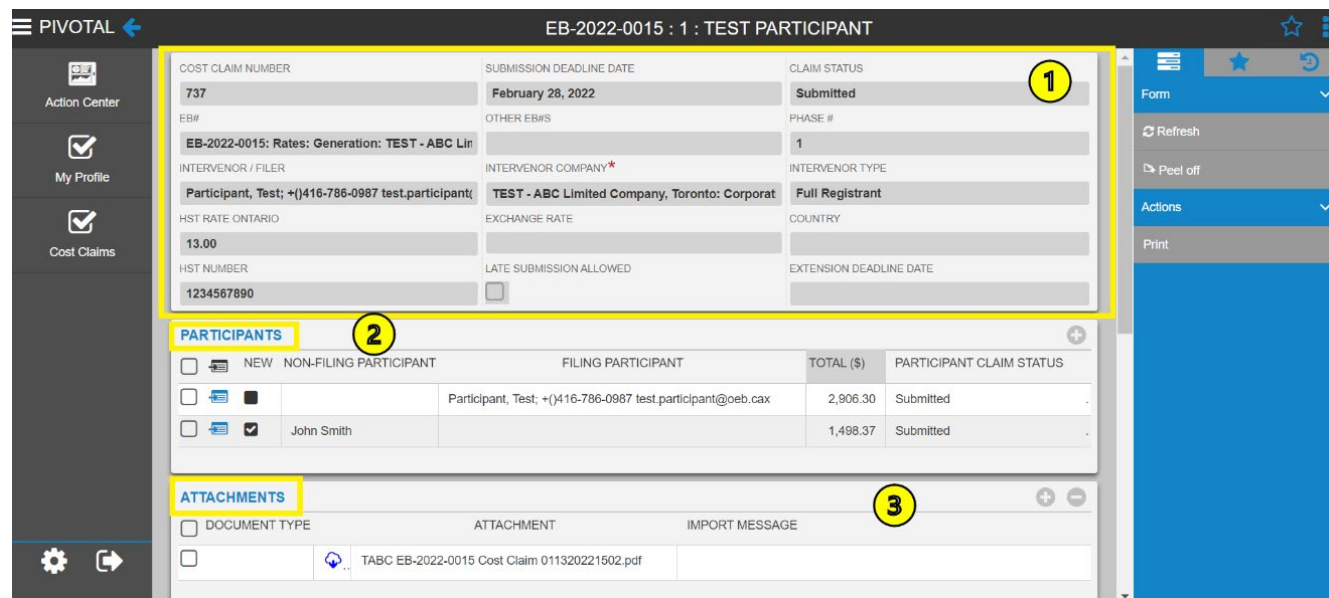
Attachments Grid

3 The **ATTACHMENTS** grid on the **Cost Claim Header** will include general attachments related to the cost claim such as a cover letter.

Submitting the cost claim to the OEB will generate a file that includes **all** participant claims and receipts and placed on the public record through our website and the OEB Regulatory Document Search.

When the OEB approves the cost claim, another file will be generated and posted similarly.

Cost Claim Header – Top Section



Cost Claim Header – Lower Section

Cost Claim Summary

- 4 This section displays the total cost claim amount, payment details, total amount awarded and any reasons for disallowance if the amount awarded is less than the amount claimed

Submit Section

- 5 This section replaces the Affidavit.

PIVOTAL EB-2022-0015 : 1 : TEST PARTICIPANT

TOTAL LEGAL/CONSULTANT/OTHER FEES	TOTAL DISBURSEMENTS	TOTAL HST
3,730.00	167.94	506.73

TOTAL CLAIM: 4,404.67

TOTAL AMOUNT AWARDED: [Empty]

REASON FOR DISALLOWANCE: [Empty]

REASON FOR DISALLOWANCE 2: [Empty]

REASON FOR DISALLOWANCE 3: [Empty]

MAKE CHEQUE PAYABLE TO: Leslie Participant

SEND PAYMENT TO ADDRESS: 1 First Street, Toronto, ON M4F3D3

ATTENTION: [Empty]

SUBMIT SECTION

I am a representative of the Party. I have examined all of the documentation in support of this cost claim. The costs incurred and time spent are directly related to the Party's participation in the OEB Process referred to above.

This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in section 6.05 and 6.09 of the OEB's Practice Direction on Cost Awards.

The information (fees and disbursements) filed in this cost claim is complete and accurate and in accordance with the OEB's Practice Direction for Cost Awards and Appendix A, the Cost Awards Tariff.

SUBMITTED BY: Leslie Participant

DATE SUBMITTED: January 13, 2022

CREATE A COST CLAIM

The following are the steps to create and submit a cost claim to the OEB:

- Select a **Case**
- Enter **Cost Claim Header** information
- Select **Participants**
- Enter **Participant Hours HEARINGS** or **CONSULTATIONS**
- Enter **Participant Disbursements**
- Add **Participant Attachments**
- Submit to **Intervenor** on **Participant record**
- Submit **Cost Claim** to OEB

6. SELECT A CASE

After selecting the case from the **COST CLAIMS** portal,

- 1 Click on **Create Cost Claim** (right-hand navigation panel)
- 2 This will display the **PHASE #** of the case and **SUBMISSION DEADLINE**
- 3

The cost claim must be submitted to the OEB on or before the deadline date

EB-2022-0015: RATES: GENERATION: TEST - ABC LIMITED COMPANY

CASE: EB-2022-0015: Rates: Generation: TEST - ... PHASE: 1 CASE STATUS: Open

APPLICATION TYPE: Rates INITIAL APPLICATION RECEIVED DATE: December 31, 2020 APPLICANT: TEST - ABC Limited Company, Toronto: Cc

COST CLAIM SUBMISSION DEADLINE: February 28, 2022

	INTERVENOR	INTERVENOR COMPANY	PHASE #	SUBMISSION DEADLINE	CLAIM STATUS	TOTAL AMOUNT AWARDED
<input type="checkbox"/>	Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submit...	
<input type="checkbox"/>	Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submit...	
<input type="checkbox"/>	Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submit...	
<input type="checkbox"/>	Participant, Test; +(416-786-0987 tes...	TEST - ABC Limited Compan...	1	February 28...	Submit...	
<input type="checkbox"/>	Ramsay, Lynn; +1 (416) 481-1967 lyn...	TEST - ABC Limited Compan...	1	February 28...	In Prog...	
<input type="checkbox"/>	Ramsay, Lynn; +1 (416) 481-1967 lyn...	TEST - ABC Limited Compan...	1	February 28...	In Prog...	

EB-2022-0016: Rates: Generation: Ontario Energy Board

7. ENTER COST CLAIM HEADER INFORMATION

- When the cost claim opens, select the **INTERVENOR COMPANY** you are representing.
- The system will populate with the information from the Intervenor’s profile (HST rate and number), eliminating the need to re-enter this information for each cost claim.
- Please confirm that this information is correct and if not, contact registrar@oeb.ca
- The form allows for information such as **OTHER EB#s**, **EXCHANGE RATE** and **COUNTRY** to be entered if applicable.
- Click the **checkmark** to save the data.

The screenshot displays the 'PIVOTAL COST CLAIM' interface. On the left is a navigation sidebar with 'Action Center', 'My Profile', and 'Cost Claims'. The main form area is divided into several sections:

- Header Information:** Includes fields for 'COST CLAIM NUMBER', 'SUBMISSION DEADLINE DATE' (February 25, 2022), 'CLAIM STATUS' (New), 'EB#' (EB-2022-0016: Rates: Generation: Ontario), 'OTHER EB#S' (EB-2021-0000), 'PHASE #' (1), 'INTERVENOR / FILER' (Ramsay, Lynn; +1 (416) 481-1967 lynn.ram), 'INTERVENOR COMPANY*' (TEST - ABC Limited Company, Toroi), 'INTERVENOR TYPE' (Full Registrant), 'HST RATE ONTARIO' (13.00), 'EXCHANGE RATE' (-/+), 'COUNTRY', 'HST NUMBER' (1234567890), 'LATE SUBMISSION ALLOWED' (checkbox), and 'EXTENSION DEADLINE DATE'.
- PARTICIPANTS:** A table with columns for 'NEW', 'NON-FILING PARTICIPANT', 'FILING PARTICIPANT', 'TOTAL (\$)', and 'PARTICIPANT CLAIM STATUS'.
- ATTACHMENTS:** A table with columns for 'DOCUMENT TYPE', 'ATTACHMENT', and 'IMPORT MESSAGE'.

On the right side, there is a 'Form' menu with options like 'Refresh', 'Peel off', 'Submit', and 'Print'. A yellow checkmark icon is highlighted in the top right corner of the form area, indicating the save action.

8. SELECT PARTICIPANTS

- **Participants** represents everyone who has a cost claim to be submitted, including the intervenor who is responsible for the overall cost claim.
- To prepare cost claims for each participant, the intervenor will add all eligible **Participants** to the cost claim by clicking the **+** icon on the **PARTICIPANTS** grid.
- The form will update as claims are entered as well as the cost claim for each **Participant**.
- If the intervenor is entering their own cost claim, they will also add a **Participant** record for themselves.

PIVOTAL ← COST CLAIM

COST CLAIM NUMBER: [Blank] SUBMISSION DEADLINE DATE: February 28, 2022 CLAIM STATUS: New

EB#: EB-2022-0015: Rates: Generation: TEST - , OTHER EB#S: [Blank] PHASE #: 1

INTERVENOR: Ramsay, Lynn; +1 (416) 481-1967 lynn.ram INTERVENOR COMPANY*: TEST - ABC Limited Company, Toroi INTERVENOR TYPE: Full Registrant

HST RATE ONTARIO: 13.00 EXCHANGE RATE: - [Blank] + COUNTRY: [Blank]

HST NUMBER: 1234567890 LATE SUBMISSION ALLOWED: [Blank] EXTENSION DEADLINE DATE: [Blank]

PARTICIPANTS [+] ADD

NEW	NON-FILING PARTICIPANT	FILING PARTICIPANT	TOTAL (\$)	PARTICIPANT CLAIM STATUS
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

ATTACHMENTS [+] [-]

DOCUMENT TYPE	ATTACHMENT	IMPORT MESSAGE
<input type="checkbox"/>		

9. ATTACHMENTS GRID

- This section of the **Cost Claim** header is where general attachments related to the cost claim such as a cover letter can be uploaded.
- To add an attachment, click the **+** icon
- Select your document under the **ATTACHMENT** column
- Select **'COVER LETTER'** under **DOCUMENT TYPE**

PIVOTAL ← EB-2022-0016

EB-2022-0016: Rates: Generation: Ontario

INTERVENOR / FILER: Ramsay, Lynn; +1 (416) 481-1967 lynn.ram INTERVENOR COMPANY*: TEST - ABC Limited Company, Toronto: C INTERVENOR TYPE: Full Registrant

HST RATE ONTARIO: 13.00 EXCHANGE RATE: - [Blank] + COUNTRY: [Blank]

HST NUMBER: 1234567890 LATE SUBMISSION ALLOWED: [Blank] EXTENSION DEADLINE DATE: [Blank]

PARTICIPANTS [+]

NEW	NON-FILING PARTICIPANT	FILING PARTICIPANT	TOTAL (\$)	PARTICIPANT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	New
		Van Pelt, Lucy; +(416)-786-0987 lucy.vanpelt@oeb.cax		

ATTACHMENTS [+] [-] ADD

DOCUMENT TYPE	ATTACHMENT	IMPORT MESSAGE
<input type="checkbox"/>		

TOTAL LEGAL/CONSULTANT/OTHER FEES: [Blank] TOTAL DISBURSEMENTS: [Blank] TOTAL HST: [Blank]

10. SET UP PARTICIPANT

1 After selecting the case and creating a cost claim, select the '+' icon on the far right to add a participant.

The **PARTICIPANT** cost claim form will open.

2 To edit an existing participant record, click the blue icon to the left of the participant's name.

3 To add a participant, select the **FILING PARTICIPANT** from the dropdown list.

Any information previously entered and saved in the participant's profile will populate the form.

The screenshot shows the 'PARTICIPANT' form in the PIVOTAL system. The top section contains fields for 'COST CLAIM NUMBER' (914), 'SUBMISSION DEADLINE DATE' (February 28, 2022), and 'CLAIM STATUS' (In Progress). Below this is a table of participants. The table has columns for 'NEW', 'NON-FILING PARTICIPANT', 'FILING PARTICIPANT', 'TOTAL (\$)', and 'PARTICIPANT C'. One participant is listed: 'Brown, Sally; +1 (416) 345-5913 sally.brown@oeb.cax' with a total of 0.00 and status 'New'. A blue '+' icon is highlighted in the top right of the table, and a blue edit icon is highlighted next to the participant's name.

The screenshot shows the 'PARTICIPANT' form with the 'FILING PARTICIPANT' dropdown menu open. The dropdown is highlighted with a yellow box and contains a list of participants. The first participant is 'Account11, Test; +1(999)999-9999 test.account11@oeb.cax'. The second is 'Brown, Charlie; +1 (416) 481-1967 charlie.brown@oeb.cax'. The third is 'Brown, Sally; +1 (416) 345-5913 sally.brown@oeb.cax'. The fourth is 'Participant, Test; 40(416) 786-0687 test.participant@oeb.cax'. A yellow circle highlights the 'FILING PARTICIPANT' dropdown menu.

- 4 If the participant is not named in the dropdown list, click ‘NEW PARTICIPANT’
 - o Enter the **NON-FILING PARTICIPANT FIRST** and **LAST NAME**
 - o Select the **SERVICE PROVIDER TYPE**
 - o Enter **YEAR CALLED TO BAR** (for Legal Counsel) and **COMPLETED YEARS PRACTICING**
 - o If the **HST RATE** charged by the participant is different, select the correct rate.
 - o Save the form to ensure the **HOURLY RATE** is populated.

- Select the case category – **HEARINGS** or **CONSULTATIONS** (only the available option will be selectable) and/or **DISBURSEMENTS** checkboxes.
- This will create the corresponding forms to be filled out for the participant.

The screenshot shows the 'PARTICIPANT' form in the PIVOTAL system. The form is divided into several sections: CASE, COST CLAIM, INTERVENOR / FILER NAME, and PARTICIPANT CLAIM STATUS. A yellow box highlights the 'NEW PARTICIPANT' checkbox and the 'NON-FILING PARTICIPANT FIRST NAME*' and 'NON-FILING PARTICIPANT LAST NAME*' fields. Another yellow box highlights the 'HEARINGS' checkbox in the left sidebar. The 'HEARINGS' section is expanded, showing a table for 'REVIEW APPLICATION AND EVIDENCE' and 'DISCOVERY'.

NAME	HOURS	HOURLY RATE	SUB...	HST RATE	HST	TOTAL
REVIEW APPLICATION AND EVIDENCE						
DISCOVERY						

11. ENTER PARTICIPANT HOURS – HEARINGS

- 1 To enter **HEARINGS** hours, click on the **HEARINGS** checkbox in the top grid.
- 2 The **HEARINGS** form will prepopulate with the activities that can be claimed.
- 3 Enter the hours claimed and then click on the checkmark to save the form.
- 4 Either click on the **Attachments** task on the left or scroll down to the **ATTACHMENTS** grid at the bottom of the form.
- 5 Click on the **ATTACHMENT** column. Upload your attachment(s) and indicate the **DOCUMENT TYPE** from the dropdown list.

PIVOTAL SALLY BROWN

SERVICE PROVIDER TYPE* Legal Counsel YEAR CALLED TO BAR* 2001 COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 20 HOURLY RATE 330

CV STATUS (FOR CONSULTANT/ANALYST) LAST CV DATE DISBURSEMENTS

HEARINGS **1** CONSULTATIONS **6**

HEARINGS SUBTOTAL (\$) 1,650.00 HEARINGS TOTAL TAX (\$) 214.50 HEARINGS TOTAL (\$) 1,864.50

REVIEW APPLICATION AND EVIDENCE **2**

NAME	HOURS	HOURLY RATE	SUB...	HST RATE	HST	TOTAL
Review Application and Evidence	5.00	330	1,650.00	13.00	214.50	1,864.50

DISCOVERY

NAME	HOURS	HOURLY RATE	SUBTOTAL	HST RATE	HST	TOTAL
Preparation of Interrogatories		330		13.00		
Review Interrogatory Responses		330		13.00		

Attachments **4**

12. ENTER PARTICIPANT HOURS – CONSULTATIONS

- 6 To enter **CONSULTATIONS** hours, click on the **CONSULTATIONS** checkbox in the top grid.
- To navigate to the **CONSULTATIONS** form, click on the **Consultations** task on the left-hand side.
- The **CONSULTATIONS** form will prepopulate with the activities that costs can be claimed for along with the **Maximum Hours** allowed.

TOTAL SERVICE PROVIDER FEES

NAME	SUBTOTAL	HST
Total Service Provider Fees:	17,820.00	2,316.6

To add an attachment, click + and then click inside the attachment field in the rows below

ATTACHMENTS **5**

ATTACHMENT	DOCUMENT TYPE	IMPORT MESSAGE
TIME DOCKET - JOHN DOE.pdf	Time Docket	

The process to enter time and include attachments is the same as noted above.

13. ENTER PARTICIPANT DISBURSEMENTS

1 To enter **DISBURSEMENTS**, click on the **DISBURSEMENTS** checkbox in the top grid.

2 To navigate to the **Disbursements** form, click on the **Disbursements** task on the left-hand side.

The **DISBURSEMENTS** form will prepopulate with the expense categories that can be claimed.

3 For each expense entered, a corresponding attachment will be required. Click on the checkmark to save the form.

4 Click in the **ATTACHMENT** column for the row to add the related documents (receipts).

The **ATTACHMENTS** grid will display the receipt type to attach.

The screenshot shows the PIVOTAL interface for user SALLY BROWN. The top navigation bar includes a menu icon, the name 'PIVOTAL', and a back arrow. The user's name 'SALLY BROWN' is displayed in the top right. Below the navigation bar is a sidebar with icons for 'Action Center', 'My Profile', and 'Cost Claims'. The main content area is divided into several sections:

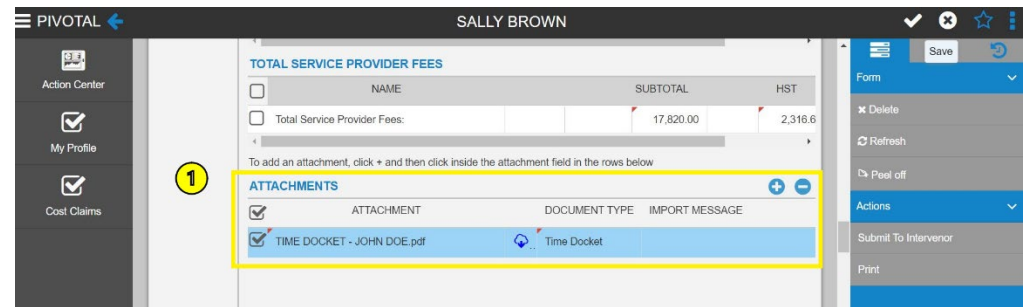
- CV STATUS (FOR CONSULTANT/ANALYST):** Includes 'CV Required' (checked), 'HEARINGS' (checked), 'CONSULTATIONS' (unchecked), and 'DISBURSEMENTS' (checked, highlighted with a yellow box and circled '1').
- DISBURSEMENTS Summary:** Shows 'DISBURSEMENTS SUBTOTAL (\$)' as 140.40, 'DISBURSEMENTS TOTAL TAX (\$)' as 18.25, and 'OTHER TAXES/TIPS TOTAL (\$)' as 0.00. The total is 158.65.
- DISBURSEMENTS Table:** A table with columns: NAME, ATT. REQ'D, ATT. PRO..., QTY, \$/UNIT, NET COST, HST RATE, HST, OTH... TAX... The table lists items like 'Scanning/Photocopy (Internal)', 'Scanning/Photocopy (External)', 'Printing (Internal)', and 'Printing (External)'. The 'External' scanning row has a checkmark in the 'ATT. REQ'D' column.
- DISBURSEMENT TOTALS:** A summary table showing 'Total Disbursements' with a net cost of 140.40.
- ATTACHMENTS Table:** A table with columns: ATTACHMENT, RELATED DISBURSEMENT CLAIM, and IMPORT MESSAGE. It lists 'PHOTOCOPIING RECEIPTS - EXTERN.' and 'Printing (Internal)'. A yellow box highlights this section, and a circled '4' points to the 'ATTACHMENT' column.

On the right side, there is a 'Form' menu with options like 'Delete', 'Refresh', 'Peel off', 'Submit To Intervenor', and 'Print'. A yellow box and circled '3' highlight the top right corner of the interface, indicating where to click to save the form.

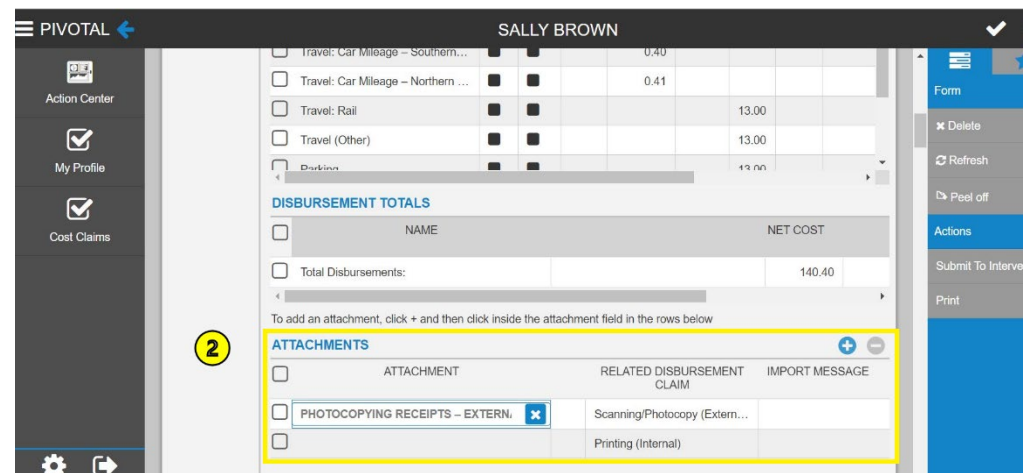
14.ADD PARTICIPANT ATTACHMENTS

There are **three areas** where documents can be attached to the cost claim:

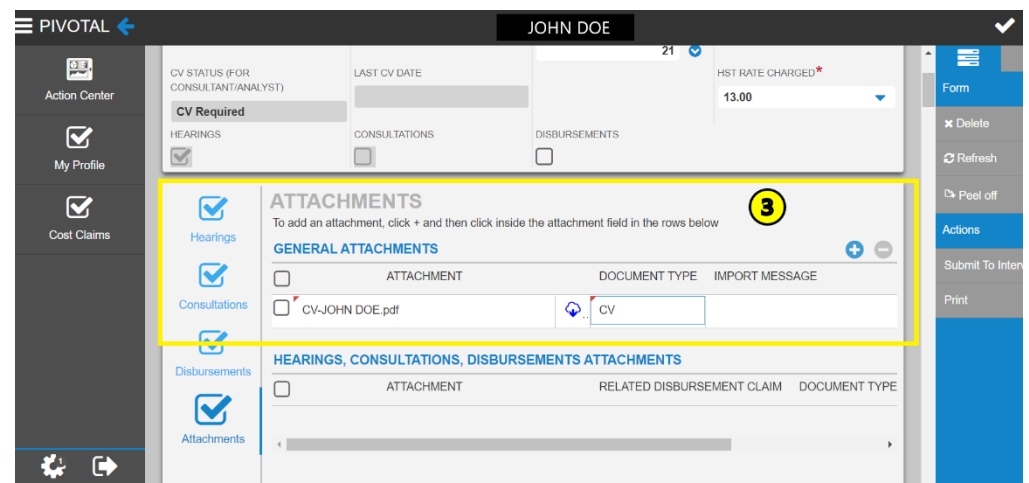
- 1 On the **Hearings/Consultations** form i.e.,
 - **TIME DOCKET**
 - **INVOICE** (if the *Service Provider is a consultant*)



- 2 On the **Disbursements** form for each expense claimed.



- 3 On the **Participant** form under **General Attachments**. Consultants and Analysts will attach their CV on this grid.



15. SUBMIT TO INTERVENOR (PARTICIPANT)

Once a cost claim has been entered for a participant and all required attachments included, the claim can be submitted to the **Intervenor**.

1 Select **'Submit to Intervenor'**

The screenshot shows the PIVOTAL interface for user SALLY BROWN. The main content area displays details for a cost claim: CASE EB-2022-0015: Rates: Generati, COST CLAIM EB-2022-0015 : 1 : Lynn I, INTERVENOR / FILER NAME Ramsay, Lynn; +1 (416) 481-19, and PARTICIPANT CLAIM STATUS In Progress. The FILING PARTICIPANT is Brown, Sally; +1 (416) 34. The SERVICE PROVIDER TYPE is Legal Counsel, and the YEAR CALLED TO BAR is 2001. The HEARINGS section shows a subtotal of 8,910.00, a total tax of 1,158.30, and a total of 10,068.30. The bottom section is titled REVIEW APPLICATION AND EVIDENCE. On the right-hand side, there is a 'Form' dropdown menu with options: Delete, Refresh, Peel off, Actions, and Print. The 'Actions' dropdown is expanded, showing 'Submit to Intervenor' as the selected option, highlighted with a yellow box and a circled '1'.

2 The status on the Participant cost claim changes from **'In Progress'** to **'Submitted.'**

Click the arrow (top left) to return to the **Cost Claim Header**.

The screenshot shows the PIVOTAL interface for user SALLY BROWN. The main content area displays details for the same cost claim, but the PARTICIPANT CLAIM STATUS is now Submitted. The FILING PARTICIPANT is now Brown, Sally; +1 (416) 345-591. The HEARINGS section remains the same. On the right-hand side, the 'Form' dropdown menu is expanded, showing options: Delete, Refresh, Peel off, Actions, Revise, and Print. The 'Actions' dropdown is expanded, showing 'Revise' as the selected option. A yellow box highlights the 'PARTICIPANT CLAIM STATUS' field with the value 'Submitted', and another yellow box highlights the back arrow icon in the top left corner of the PIVOTAL header.

16. SUBMIT COST CLAIM TO THE OEB (INTERVENOR LEVEL)

The Intervenor is responsible for submitting the cost claim to the OEB (from the **Cost Claim Header**) and does so only after all participant cost claims have been entered and submitted to the Intervenor.

- 1 Enter the name of who the cheque should be made payable to **here**.
- 2 Ensure the payment address is correct and if not, click **'Change Payment Address'** to select the correct address that was set up in **My Profile**.
- 3 Enter the name of the intervenor responsible for submitting the cost claim (*Affiant Name*) in the **'SUBMITTED BY'** field.
- 4 Click **Submit**. A confirmation email will be sent to the person submitting the claim.

PIVOTAL EB-2022-0015

TOTAL CLAIM	17,820.00	140.40	2,334.85
TOTAL AMOUNT AWARDED			
REASON FOR DISALLOWANCE			
REASON FOR DISALLOWANCE 2			
REASON FOR DISALLOWANCE 3			

MAKE CHEQUE PAYABLE TO **1**
John Doe

Change Payment Address **2**

SEND PAYMENT TO ADDRESS
123 Main Street
Ajax, ON
P3J 7S7

ATTENTION

SUBMIT SECTION

I am a representative of the Party. I have examined all of the documentation in support of this cost claim. The costs incurred and time spent are directly related to the Party's participation in the OEB Process referred to above.
This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in section 6.05 and 6.09 of the OEB's Practice Direction on Cost Awards.
The information (fees and disbursements) filed in this cost claim is complete and accurate and in accordance with the OEB's Practice Direction for Cost Awards and Appendix A, the Cost Awards Tariff.

SUBMITTED BY **3** DATE SUBMITTED

Submit **4**

A cost claim report will be generated (and appear in the **Attachment** grid). It will be placed on the public record through the OEB website and the OEB Regulatory Document Search.

Please note that in accordance with the [Practice Direction on Cost Awards](#), section 10.02, you are still responsible for sending your cost claims to the party or parties paying the cost awards.