

Welcome!

To the
Assignment of Agreement Application
Online Training Course

In this module you will learn how to:

- Create an Assignment of Agreement application
- Concur ETS request
- Retrieve and view agreement documents.

Revisions Table

Date	Revisions Type	Page Number
February 3, 2025	Initial Creation	All

INTRODUCTION

The Assignment of Agreement application form allows client to apply to replace a current agreement holder of an existing **Carbon Sequestration Evaluation Agreement (058)** or **Carbon Sequestration Agreement (059)** with a new agreement holder in Electronic Transfer System (ETS).



LOGIN TO ETS

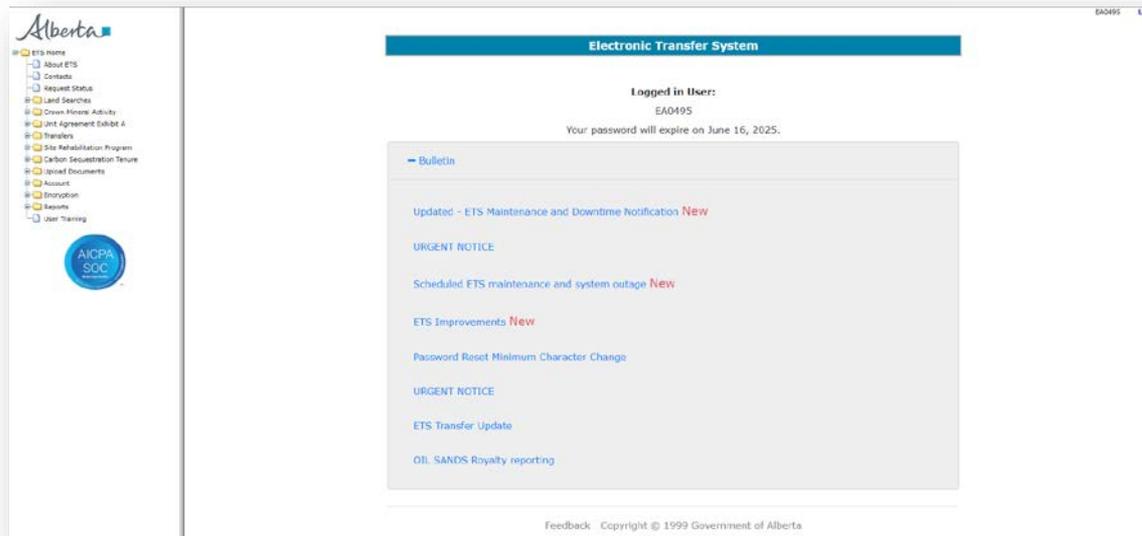
1. Go to ETS (<https://ets.energy.gov.ab.ca/logon.aspx>)
2. Enter your login credentials: User Name (EN account) and Password.



The screenshot shows the login page for the Electronic Transfer System (ETS). At the top, there is the Alberta logo and the text "Electronic Transfer System". Below this, there is a blue circular logo for "AICPA SOC". The main content area contains the following text: "Please remember to clear your browser's cache, click [HERE](#) for instructions. (This is required to ensure the **privacy** and **security** of the information)."

Below the instructions, it says "You have been successfully logged out of ETS." followed by two input fields: "User Name:" and "Password:". There is a "Save my user name" checkbox and a "Login" button. At the bottom, there are links for "Forgot Password/Reset Password".

Once logged in, the screen below is displayed.



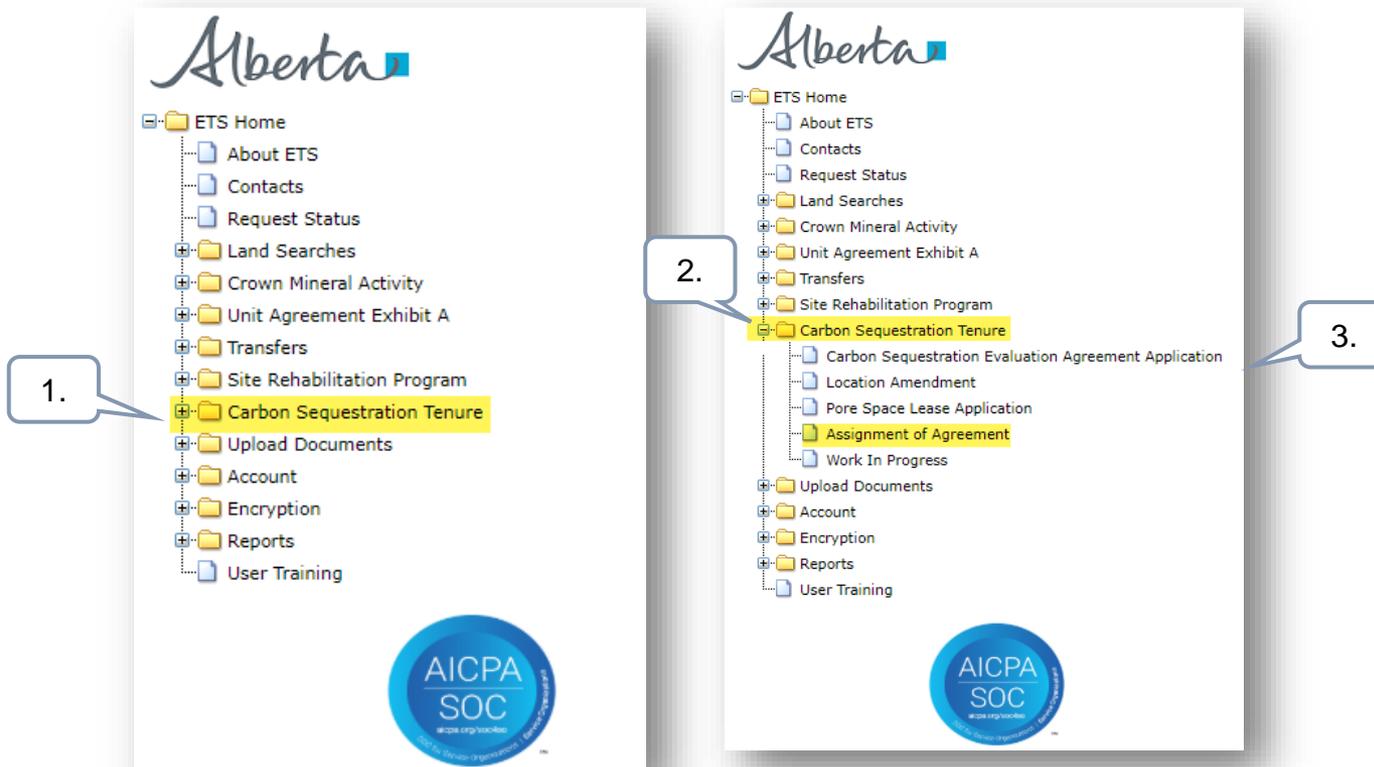
The screenshot shows the dashboard after logging in. On the left, there is a navigation menu with the following items: "ETS Home", "About ETS", "Contacts", "Request Status", "Land Searches", "Cross Border Activity", "Joint Agreement Exhibit A", "Transfers", "Site Remediation Program", "Carbon Sequestration Tenure", "Special Documents", "Account", "Innovation", "Security", and "User Training". Below the menu is the "AICPA SOC" logo.

The main content area is titled "Electronic Transfer System" and shows the user is logged in as "EA0495". It displays the message: "Your password will expire on June 16, 2025." Below this, there is a "Bulletin" section with the following items: "Updated - ETS Maintenance and Downtime Notification **New**", "URGENT NOTICE", "Scheduled ETS maintenance and system outage **New**", "ETS Improvements **New**", "Password Reset Minimum Character Change", "URGENT NOTICE", "ETS Transfer Update", and "OIL SANDS Royalty reporting".

At the bottom of the page, there is a "Feedback" link and the copyright notice: "Copyright © 1999 Government of Alberta".

NAVIGATION TO ASSIGNMENT OF AGREEMENT APPLICATION

1. In the treenode (left-hand side of the screen), navigate to **Carbon Sequestration Tenure** node.
2. Expand **Carbon Sequestration Tenure node** to display its subnodes.
3. Click **Assignment of Agreement** subnode.



The image displays two screenshots of the ETS Home application interface, illustrating the navigation steps to the Assignment of Agreement application.

Step 1: The first screenshot shows the ETS Home page with a tree view on the left. The **Carbon Sequestration Tenure** node is highlighted in yellow, and a callout bubble labeled "1." points to it.

Step 2: The second screenshot shows the **Carbon Sequestration Tenure** node expanded to display its subnodes. The **Assignment of Agreement** subnode is highlighted in yellow, and a callout bubble labeled "3." points to it. A callout bubble labeled "2." points to the expanded **Carbon Sequestration Tenure** node.

The interface includes the Alberta logo at the top left and the AICPA SOC logo at the bottom center of each screenshot.

AGREEMENT ASSIGNMENT INFORMATION SECTION

On the main screen, a blank application form is displayed. ETS auto populates the Company and Creator fields. These information are generated from the login account information.

Mandatory fields are outlined in red and flagged with asterisk (*).

Carbon Sequestration Assignment of Agreement

Please save your work frequently to avoid loss of data. The session automatically times out after 60 minutes

Status
Work in Progress

Agreement Assignment Information

Company

Creator
EA0495 (Johnalynne Hebert)

* Agreement
Q...
x

Current Agreement Holder

Current Agreement Holder Email Address

New Agreement Holder

New Agreement Holder Email Address

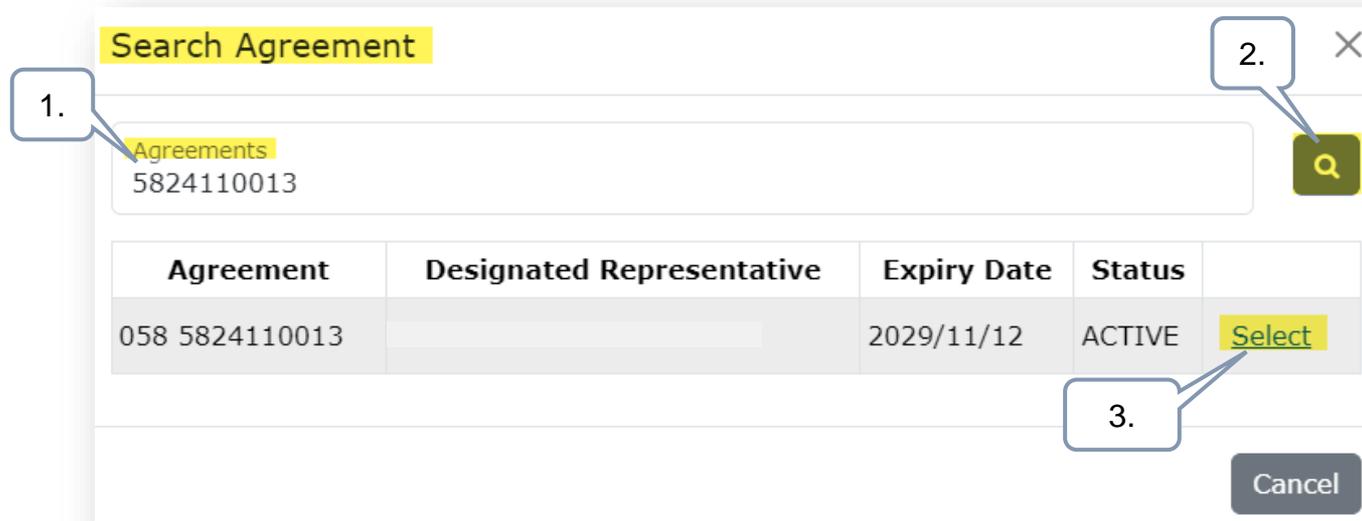
Click the **magnifying glass** to search agreement.

INFORMATION SECTION – ADD AGREEMENT

In the Search Agreement box,

1. Click the **Agreements** field and type in a carbon sequestration related agreement number.
2. Select the **magnifying glass** to search the agreement.
3. Search result appears and displays the Designated Representative, Expiry Date and Status. If the information is correct, click **Select**.

Click Cancel if you need to restart the search.



The screenshot shows a 'Search Agreement' window. Callout 1 points to the 'Agreements' dropdown menu in the search input field. Callout 2 points to the magnifying glass search icon. Callout 3 points to the 'Select' button in the search results table.

Agreement	Designated Representative	Expiry Date	Status	
058 5824110013		2029/11/12	ACTIVE	Select

INFORMATION SECTION – ADD NEW AGREEMENT HOLDER

The agreement number is now added in the application.

The Current Agreement Holder is populated based on the agreement number added.

The Email Address fields are optional.

Carbon Sequestration Assignment of Agreement

Please save your work frequently to avoid loss of data. The session automatically times out after 60 minutes

Status
Work in Progress

Agreement Assignment Information

Company

Creator
EA0495 (Johnalynne Hebert) ▼

* Agreement
058 5824110013 Q... ✕

Current Agreement Holder

Current Agreement Holder Email Address

New Agreement Holder Q... ✕

New Agreement Holder Email Address

Click the **magnifying glass** to search agreement.

INFORMATION SECTION – NEW AGREEMENT HOLDER - SEARCH CLIENT

The client can be searched by either the Client Name or the Client Number.

1. Client Name

2. Search Criteria: shell canada limited

3. Find

BA ID	Client ID	Client Name	ETS Acct	Address	
OT03	0001030001		Yes		Select
OT03	0001030018		No		Select

4. Select

Client ID

Search Criteria: 0001030

BA ID	Client ID	Client Name	ETS Acct	Address	
OT03	0001030001		Yes		Select
OT03	0001030018		No		Select

1. By default, Client Name search criteria displayed by default. Click the **dropdown** to select the desired search criteria.
2. Depending on the search criteria chosen, enter the **Client Name** OR the **Client ID** in the corresponding field.
3. Click **Find**. Search result appears and displays the Business Associate ID, Client ID, Client Name, ETS Acct Yes/No, Address.
4. Click **Select** to add the client on the form. Selected client must have an active ETS Acct. This will be required to concur the assignment.

INFORMATION SECTION – NEW AGREEMENT HOLDER ADDED

Status
Work in Progress

Agreement Assignment Information

Company

Creator
EA0495 (Johnalynne Hebert)

* Agreement
058 5824110013

Current Agreement Holder

New Agreement Holder

Current Agreement Holder Email Address

New Agreement Holder Email Address

Attachments

Choose Files No file chosen Upload

Uploaded Documents

File Name
No matching records found

Save Close

From previous slide, New Agreement Holder is now added.

ATTACHMENTS

1. Click **Choose Files**. File Explorer folders opens. Locate the file to upload. Note: up for 5 supplementary documents can be uploaded.
2. Back to the ETS request application, the name of the file is added on the 'No file chosen' field.
3. Click **Upload**.
4. Save prompt appears, click **OK**. The document is added in the Uploaded Documents grid.

To **delete** an uploaded document, simply click the corresponding **trash bin icon**.

To **add**, follow the **steps above**.

The screenshot shows the 'Carbon Sequestration Assignment of Agreement (530609)' application. At the top, a status bar indicates 'Work in Progress' and a warning to save work frequently. Below this is an 'Attachments' section with a 'Choose Files' button (callout 1) and a file name 'CS Testing Word Document.pdf' (callout 2). To the right, an 'Upload' button is highlighted with callout 3. A modal window titled 'Carbon Sequestration' displays the message 'Application has been saved.' with an 'OK' button (callout 4). Below the modal is an 'Uploaded Documents' table with one entry: 'CS Testing Word Document.pdf'. At the bottom, a 'Save' button is highlighted with callout 5, which is linked to a text box stating: '5. Click **Save** (1st save, which generate the ETS request number.' Other buttons at the bottom include 'Submit', 'Delete', and 'Close'. A callout 5 at the top right points to the ETS request number '530609'.

APPLICATION SUMMARY REPORT

The Original PDF Document link is the application summary report. It contains all data entered on the application. This tool is useful to review the entire application before submitting the application.

(529029)

```

ELECTRONIC TRANSFER SYSTEM                               Page: 1
ORIGINAL REQUEST 529029                                  January 12, 2025 8:47:40 PM

Assignment of Agreement
Company:
Creator:                EA0495
Agreement               058 5824110013
Current Agreement Holder
Current Agreement Holder Email Address
New Agreement Holder
New Agreement Holder Email Address

Concurrence Comments
Current Agreement Holder Concur Client ID   EA0495
Current Agreement Holder Concurrence Date  2025-01-12
New Agreement Holder Concur Client ID      EA0324
New Agreement Holder Concurrence Date      2025-01-12
New Agreement Holder Concurrence Decision  Yes

Attachments
File Name:                R529029.CST_ASSIGN_ATTACHMENT.20250112203259.CS Testing Word
Document.pdf

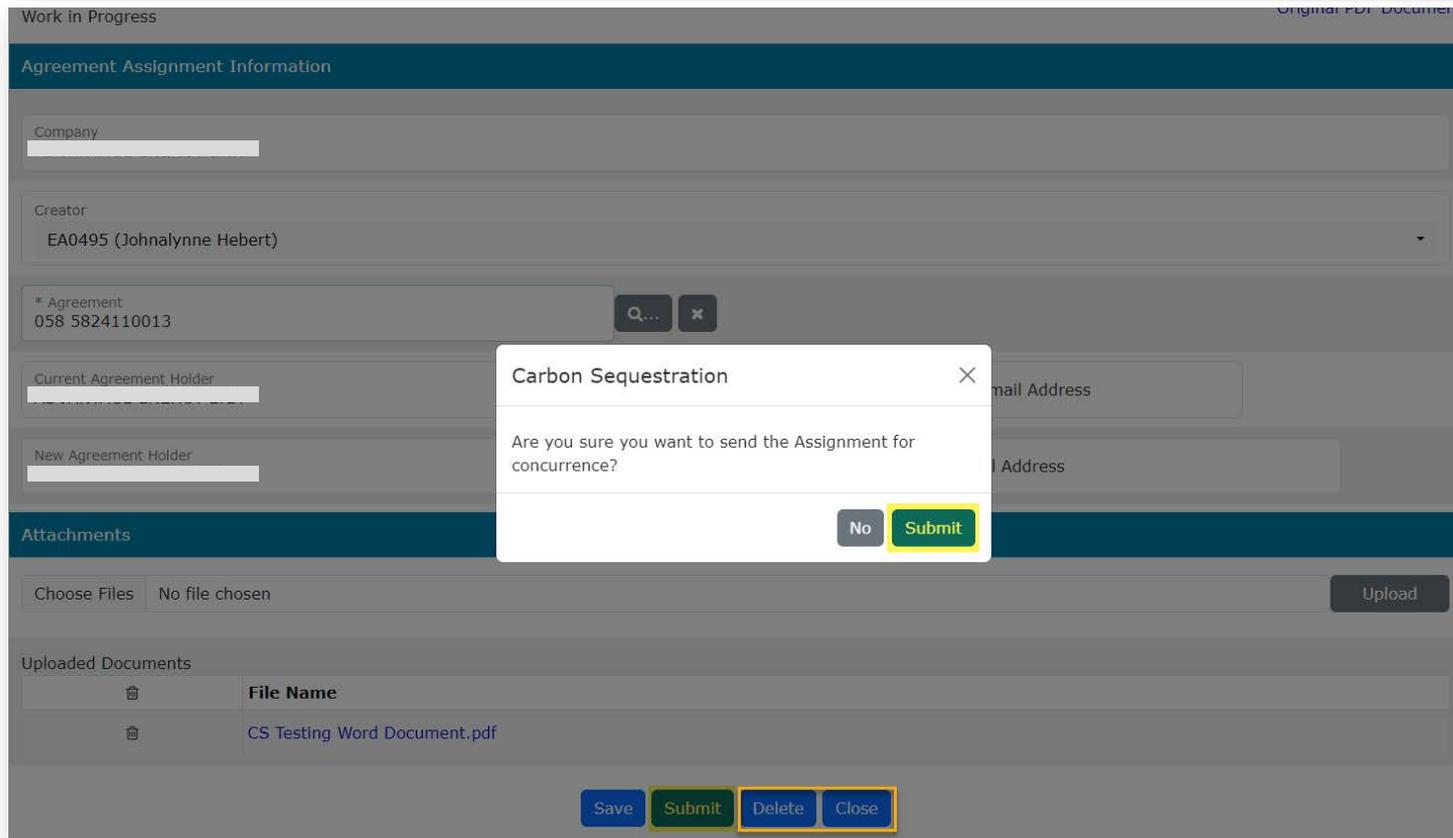
*** End of Report ***
    
```

Original PDF Document

Click **Original PDF Document** located at the top right of the form to generate the report.

SUBMIT APPLICATION

Once all pertinent information has been entered, submit the Assignment of Agreement Application. The system performs validation check to ensure all mandatory data has been provided. Upon successful submission, the status is updated to **Concur**.

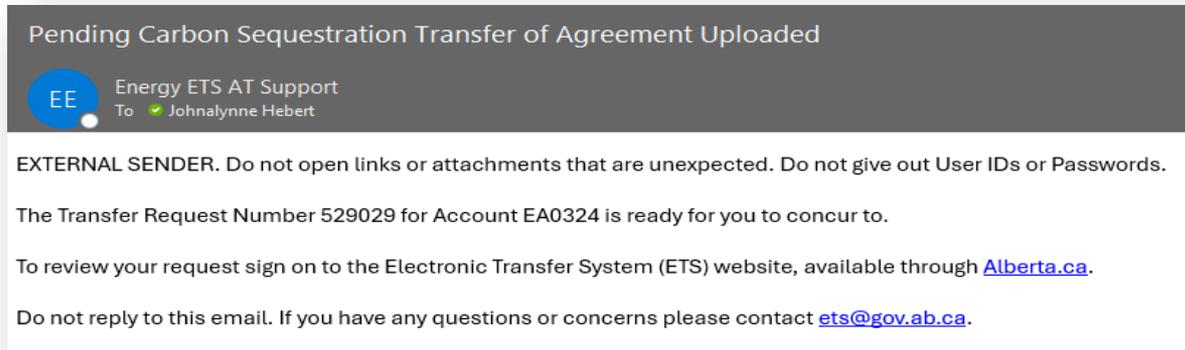


The screenshot shows a web application interface for 'Work in Progress' with a modal dialog box open. The background form includes sections for 'Agreement Assignment Information' (Company, Creator: EA0495 (Johnalynne Hebert), Agreement: 058 5824110013, Current Agreement Holder, New Agreement Holder) and 'Attachments' (Choose Files, No file chosen, Upload). A table of 'Uploaded Documents' lists 'CS Testing Word Document.pdf'. At the bottom are buttons for 'Save', 'Submit', 'Delete', and 'Close'. The modal dialog, titled 'Carbon Sequestration', asks 'Are you sure you want to send the Assignment for concurrence?' and has 'No' and 'Submit' buttons.

Delete (deletes entire application) is available when the request Status is at Work in Progress.
Close (closes application).

CONCURRENCE

The concurrer receives an email notification requesting to login to ETS to concur a specific request. If the creator of the request is the New Agreement Holder, then the Current Agreement Holder will concur and vice versa.



Login to ETS as the concurrer.

1. Navigate to Carbon Sequestration Tenure/Work in Progress

2. Enter the Request Number quoted from the email notification.

3. Click Find.

4. Click the Request number to open the application.

Request	Application Type	Status	Creator	Last Update Date	Documents
529029	Assignment Application	Concur	EA0495	2025/01/12 08:34 PM	View

Showing 1 to 1 of 1 rows

CONCURRENCE

EA0495 Logout

Carbon Sequestration Assignment of Agreement (529029)

Please save your work frequently to avoid loss of data. The session automatically times out after 60 minutes.

Status
Concur [Original PDF Document](#)

Concurrence Decision
Please select

Concurrence Comments

1. Add Concurrence Decision. Select from the dropdown either **Accept** or **Reject**

2. If the concurrence decision is **Reject**, add the reason here under **Comments**.

Carbon Sequestration Assignment of Agreement (529029)

Please save your work frequently to avoid loss of data. The session automatically times out after 60 minutes.

Status
Concur [Original PDF Document](#)

Concurrence Decision
Yes

Concurrence Comments

3. Click **Save**.

Carbon Sequestration

Application has been saved.

OK

SUBMIT CONCURRENCE DECISION

The screenshot shows a web application interface for submitting a concurrence decision. The background is dimmed, showing fields for Agreement ID (058 5824110013), Current Agreement Holder, and New Agreement Holder. Below these are sections for Attachments and Uploaded Documents (including 'CS Testing Word Document.pdf'). At the bottom, there are buttons for Save, Submit, Delete, and Close. Two modal windows are overlaid on the interface:

- Modal 1:** Titled 'Carbon Sequestration', it asks 'Are you sure you want to submit the concurrence decision?' and has 'No' and 'Submit' buttons. A callout bubble points to the 'Submit' button with the text: "1. Click **Submit**."
- Modal 2:** Also titled 'Carbon Sequestration', it displays the message 'Application has been submitted.' and has an 'OK' button. A callout bubble points to the 'OK' button with the text: "2. Click **Submit**." (Note: this text is positioned above the modal in the image).

When the concurrer submits the concurrence decision, this will submit the application.

If the concurrence decision is No, the application is rejected and the creator is notified via email notification.

WITHDRAW APPLICATION

The Withdraw button is only available when the Status is Submitted.

The creator, submitter or concurren has the option to withdraw the application during the duration of the status Submitted.

When the request status is changed from Submitted to Processing, the Withdraw option is no longer available.

Agreement Assignment Information

Company

Creator

* Agreement
058 5824110013

Current Agreement Holder

Current Agreement Holder Email Address

New Agreement Holder

New Agreement Holder Email Address

Attachments

Choose Files No file chosen Upload

Uploaded Documents

		File Name
🗑		CS Testing Word Document.pdf

Save
Withdraw
Close

WORK IN PROGRESS

The Work in Progress screen contains all different status depending on the state of each ETS Request. To search all ETS requests, select the **Find** icon on the Work in Progress screen.

User can also narrow the search by the following search parameters: **Status**, **Request Number**, **Start Date** and **End Date**.

Request	Application Type	Status	Creator	Last Update Date	Documents
529029	Assignment Application	Processing	EA0495	2025/01/12 08:50 PM	View
526366	Evaluation Application	Completed	EA0495	2024/11/14 06:15 AM	View
526333	Pore Space Application	Processing	EA0495	2024/11/07 09:37 PM	View
518990	Pore Space Application	Work in Progress	EA0495_CSTESTING	2024/07/19 01:07 PM	View
518839	Pore Space Application	Processing	EA0495_CSTESTING	2024/07/15 03:19 PM	View

WORK IN PROGRESS – continued...

Work in Progress

The creator can modify and save the form.

Submitted

The creator or submitter has Submitted the form.

Processing

The request has been submitted to Alberta Energy and Minerals. Only the contact information can be modified at this point. The rest of the application is read-only.

Completed

Application has been completed and agreements documents have been issued.

Client Withdrawn

Client has withdrawn the ETS application. This notifies Alberta Energy and Minerals they no longer want to proceed with the application.

Department Rejected

Alberta Energy and Minerals has rejected the client's requested application.

WORK IN PROGRESS – View Documents

User has the option to view all documents for the corresponding ETS request. The Application Documents box list all attached documents from the application.

Work in Progress

Status

Please select ▼

Request Number

Application Documents

File Name	Documents
Original Document	View/Download
Assignment of Agreement Attachments	View/Download

Start Date

End Date

[Close](#)

[Find](#)

Request	Application Type	Status	Creator	Last Update Date	Documents
529029	Assignment Application	Processing	EA0495	2025/01/12 08:50 PM	View
526366	Evaluation Application	Completed	EA0495	2024/11/14 06:15 AM	View
526333	Pore Space Application	Processing	EA0495	2024/11/07 09:37 PM	View

2. Click **View/Download**

1. Click **View**

Congratulations!

You have completed the
Assignment of Agreement Application
Online Training Course

If you have any comments or questions on this training course,
please forward them to
energy.sequestrationhelpdesk@gov.ab.ca

