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to the
ETS – Unit Agreement Exhibit A
Unit Tract Revision
Online Training Course

The purpose of this course is to provide guidance and information to ETS clients who require a **Unit Tract Revision**.



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Revision Page

Revisions Table

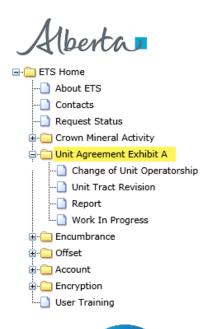
Date	Revisions Type	Page Number
March 7, 2016	Initial Creation	All
November 3, 2020	Update headers and contents	All
July 6, 2023	Update contents	15, 25

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INTRODUCTION



In this module, you will learn how to:

- Submit a Unit Tract Revision utilizing the following tabs:
 - Administrative
 - Unit Tract
 - Royalty Owners

Prerequisite Learning Module

Before proceeding, we recommend that you view the **Unit Agreement Exhibit A Roles** and **Reports** modules located in the <u>Online Learning portal</u>.

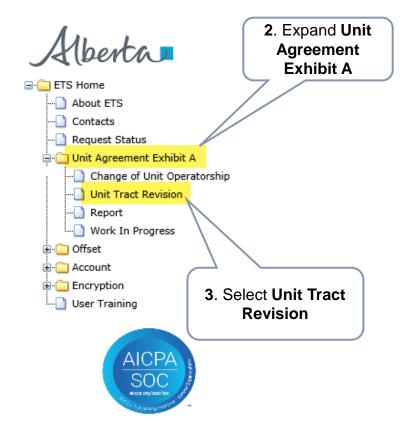
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UNIT AGREEMENT EXHIBIT A – LOGIN – UNIT TRACT REVISION

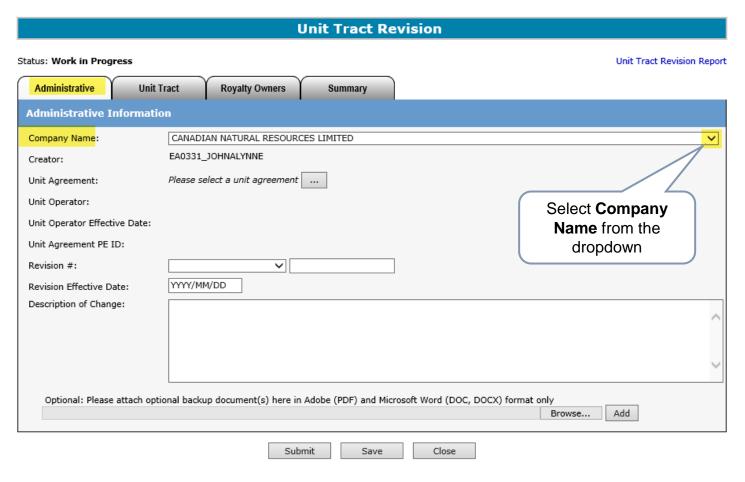
Please remember to clear your browser's cache, click HERE for instructions. (This is required to ensure the privacy and security of the information). You have been successfully logged out of ETS. User Name: Password: Save my user name Login 1. Login to ETS with your User Name and Password





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UNIT TRACT REVISION - ADMINISTRATIVE TAB - COMPANY NAME

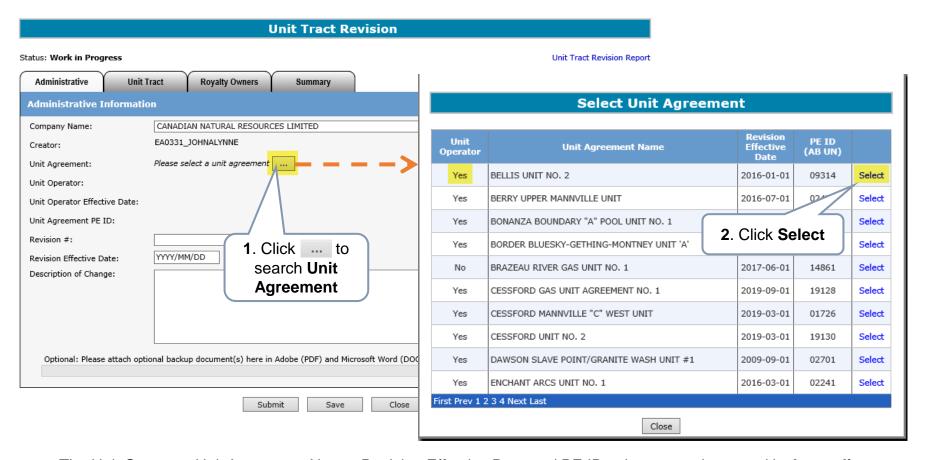


Y The Company Name dropdown includes all company that the ETS Account is assigned to.



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UNIT TRACT REVISION - ADMINISTRATIVE TAB - UNIT AGREEMENT





The Unit Operator, Unit Agreement Name, Revision Effective Date and PE ID columns can be sorted in **Ascending** or **Descending** order by clicking on the column title.

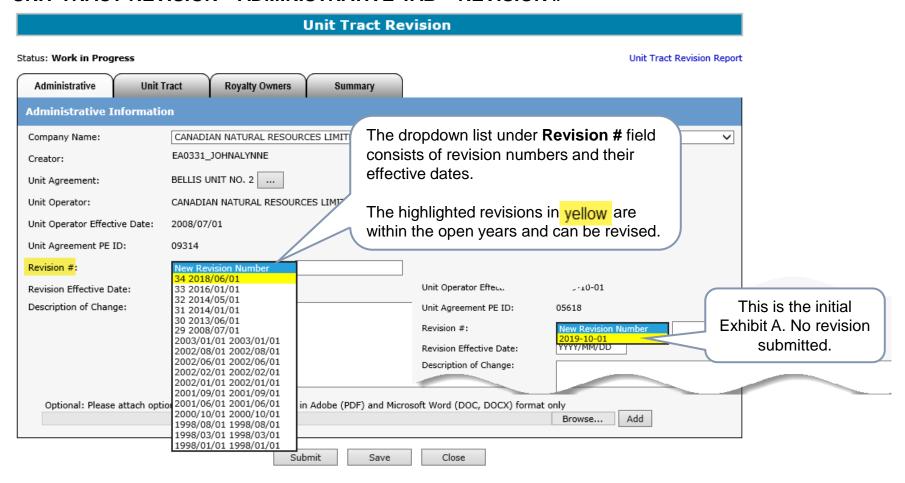
Only a Unit Operator can submit a Unit Tract Revision. Non-Unit Operator can only view the revision.

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UNIT TRACT REVISION – ADMINISTRATIVE TAB – REVISION #



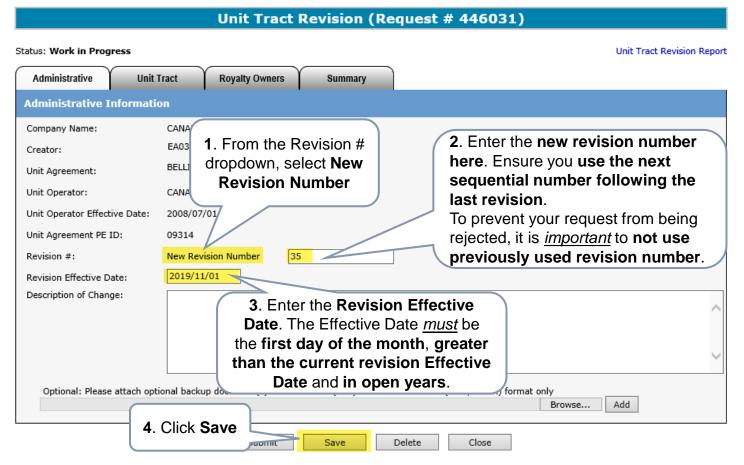


If the **New Revision Number** dropdown list is only showing one revision without a Revision number, this means that this is the initial Exhibit A and no revision(s) were submitted yet. The creator would have to be enter a New Revision Number that will be sequentially followed throughout the lifetime of this unit agreement, for example, 1, 2, 3, etc.



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UNIT TRACT REVISION – ADMINISTRATIVE TAB – REVISION # AND EFFECTIVE DATE



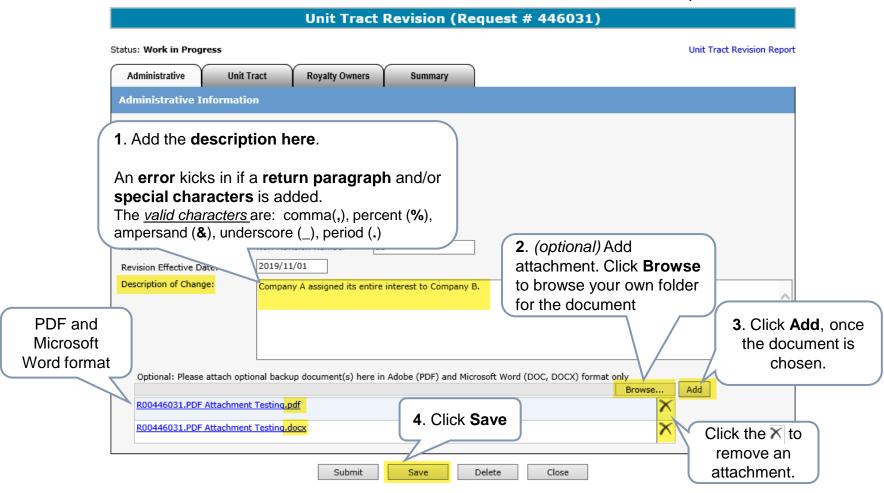
While working in the Unit Tract Revision screen, saving periodically is required to avoid the session from timing out. If there is no screen activity, the screen timeouts in 15 minutes.

Once the Save button is click, ETS generate the **Request #**, which is displayed in the header, e.g Request # 446031.



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UNIT TRACT REVISION – ADMINISTRATIVE TAB – DESCRIPTION OF CHANGE, ATTACHMENTS



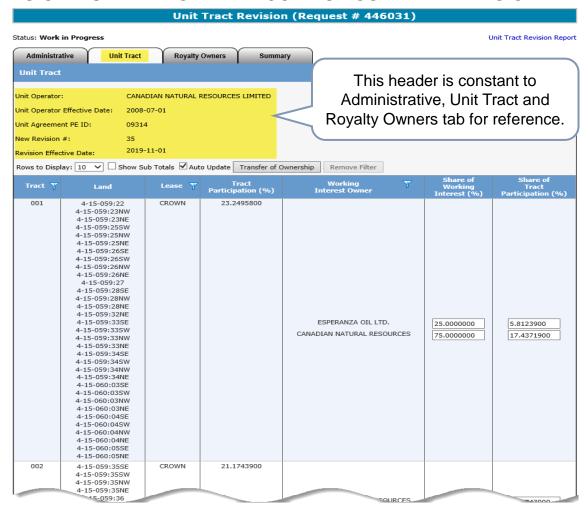


More than one document can be attached. Follow steps 2 to 4.



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UNIT TRACT REVISION – UNIT TRACT TAB – COPY OF CURRENT REVISION



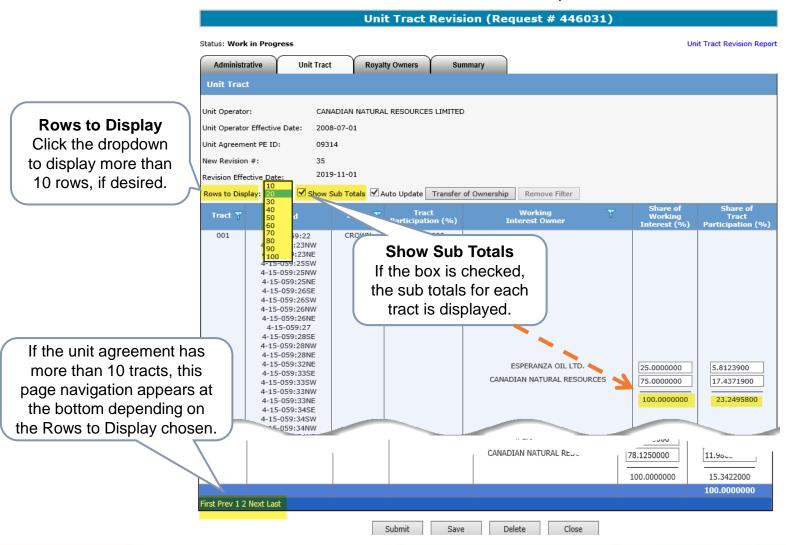


This revision is a copy of the current revision where the new revision data is updated.



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UNIT TRACT REVISION - UNIT TRACT TAB - ROWS TO DISPLAY, SHOW SUB TOTALS

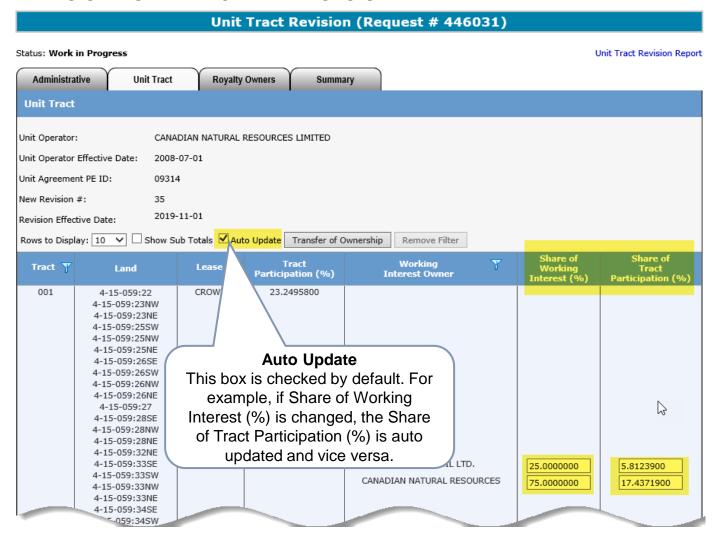


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UNIT TRACT REVISION – UNIT TRACT TAB – AUTO UPDATE

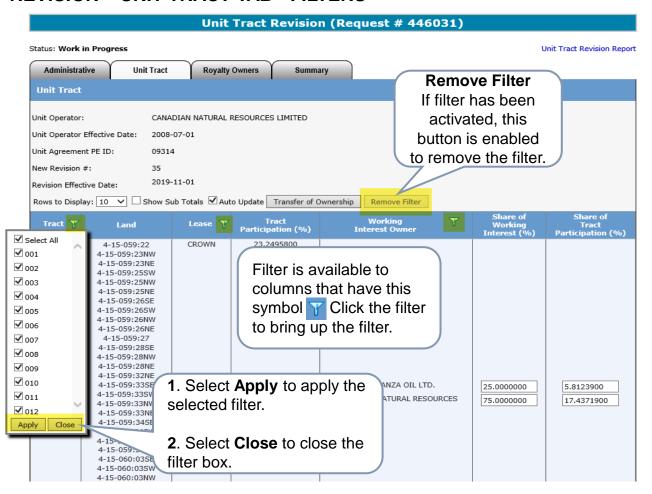


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UNIT TRACT REVISION – UNIT TRACT TAB - FILTERS



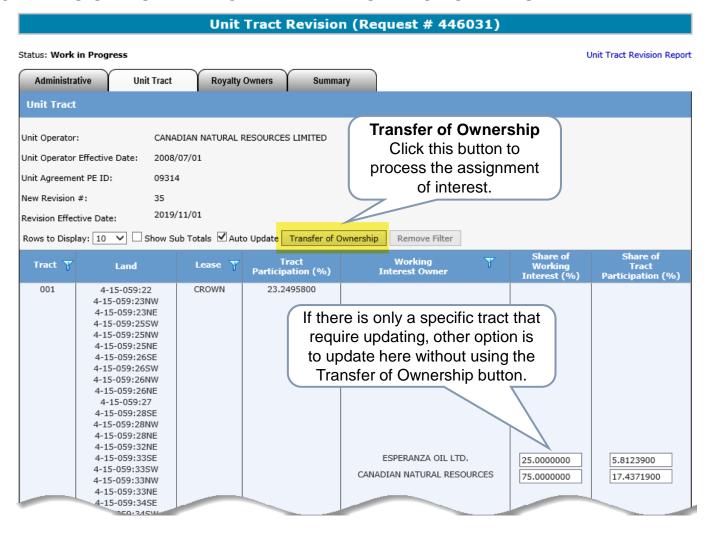


Filters are useful when there are many rows of information on a screen that you must scroll through. It allows you to narrow down the amount of information displayed.



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UNIT TRACT REVISION – UNIT TRACT TAB – TRANSFER OF OWNERSHIP

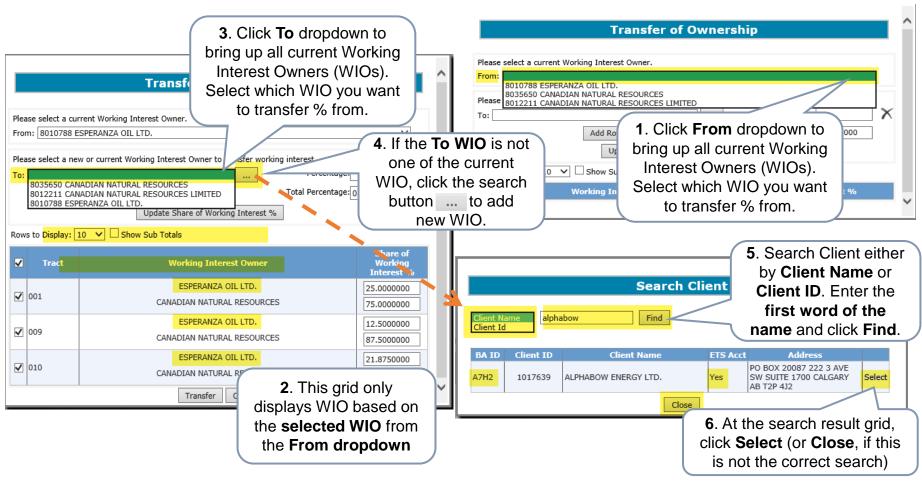


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UNIT TRACT REVISION – UNIT TRACT TAB – TRANSFER OF OWNERSHIP – INPUT FROM AND TO



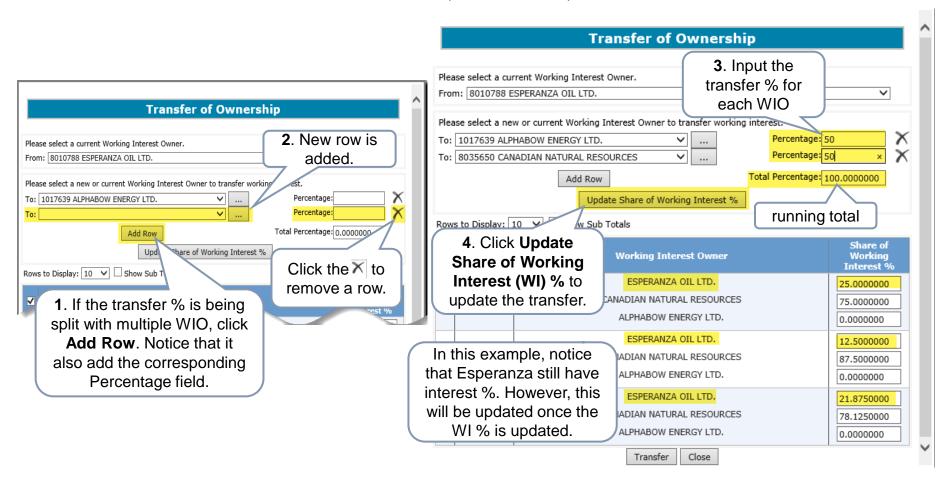
The Client ID is the Department of Energy and Minerals (DOE) Client ID.

The Business Associate (BA) ID is Alberta Energy and Minerals' (the department) internal ID use for business dealings.



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UNIT TRACT REVISION – UNIT TRACT TAB – ADD ROW, PERCENTAGE, UPDATE SHARE OF WORKING INTEREST %



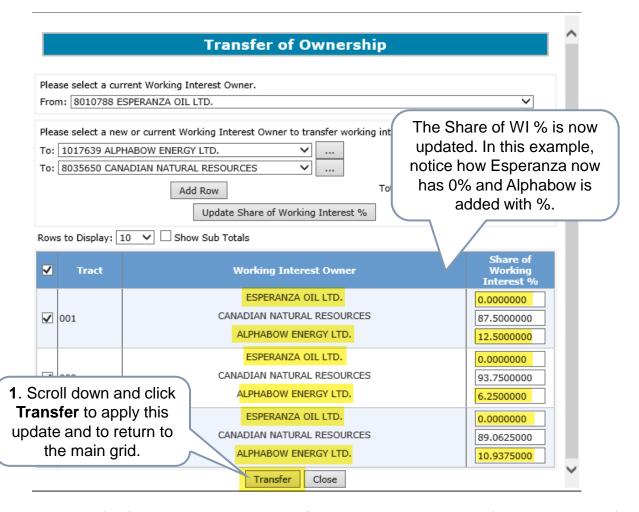


It is important to click **Update Share of Working Interest** % button once the percentage is entered to update the transfer. If this step is missed, the transfer will not reflect the correct transfer.



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UNIT TRACT REVISION – UNIT TRACT TAB – TRANSFER



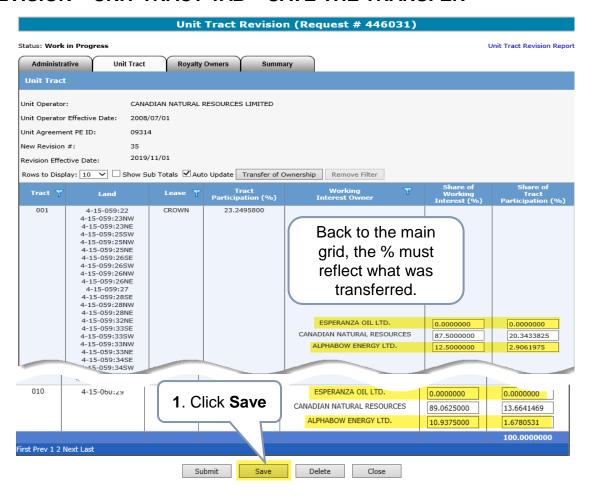


It is important to click **Transfer** (scroll down to this button). The main grid will not reflect the revision if it's not transferred.



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UNIT TRACT REVISION – UNIT TRACT TAB – SAVE THE TRANSFER



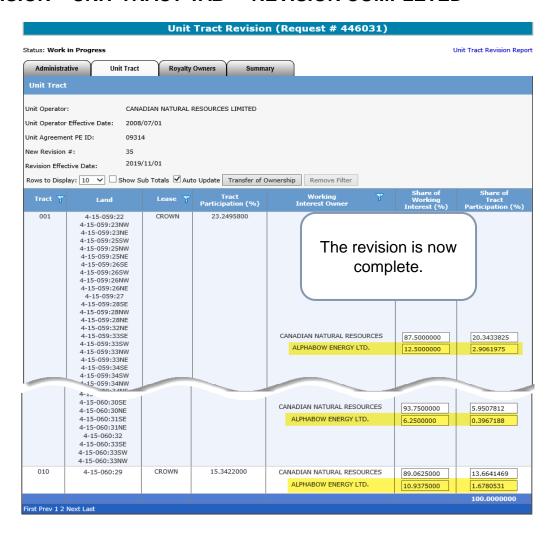


It is important to click **Save** (scroll down to this button) in order to complete and reflect the revision.



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UNIT TRACT REVISION - UNIT TRACT TAB - REVISION COMPLETED

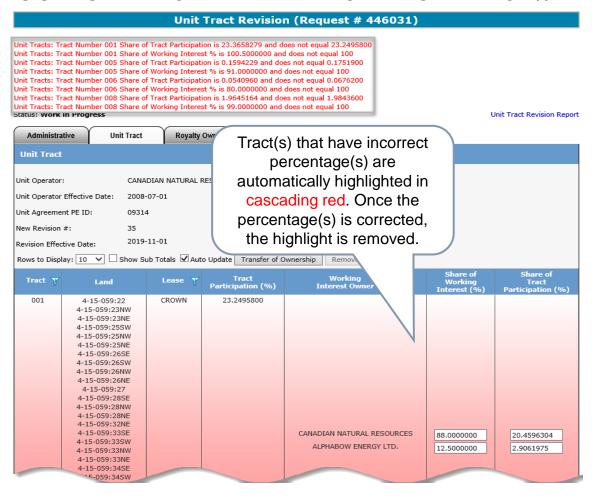


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UNIT TRACT REVISION – UNIT TRACT TAB – VALIDATION ERROR – TRACT % IN ERROR



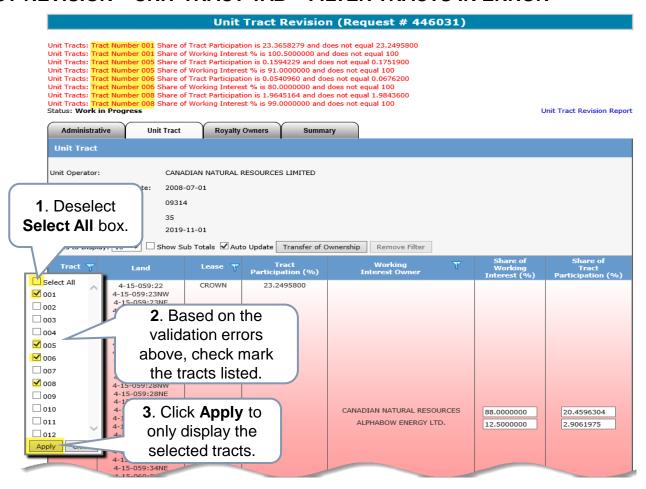


Once the revision is saved, ETS validates behind the scene if any rules were not met. If rules are not met, the validation is listed at the top in red. These must be actioned before submission.



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UNIT TRACT REVISION – UNIT TRACT TAB – FILTER TRACTS IN ERROR



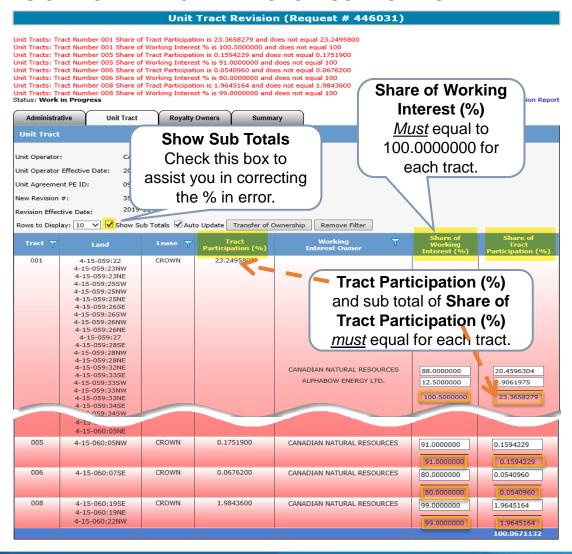


For efficient navigation of the tracts in error, utilize the **Tract** column **filter**. The filter allows you to only display the tracts in error.



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UNIT TRACT REVISION – UNIT TRACT TAB – SHOW SUB TOTALS

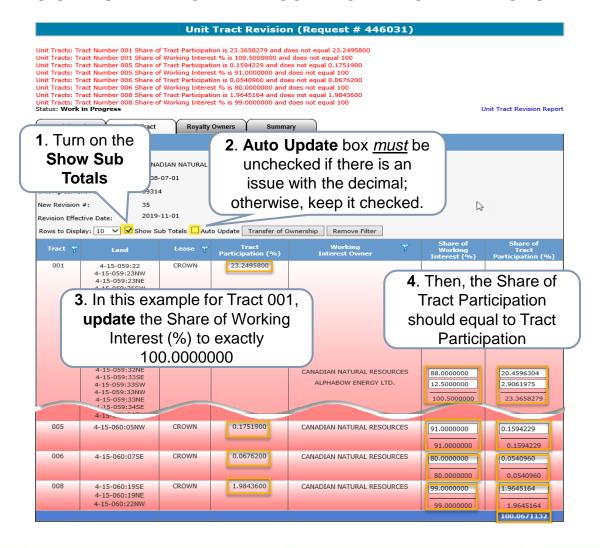


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UNIT TRACT REVISION – UNIT TRACT TAB – CORRECT TRACT IN ERRORS

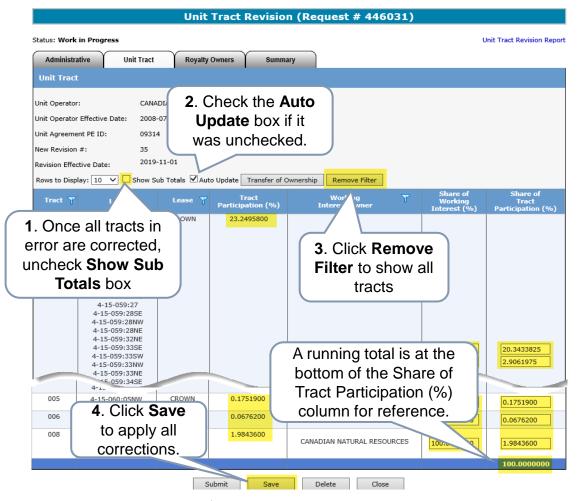


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UNIT TRACT REVISION – UNIT TRACT TAB – SAVE CORRECTIONS



The unit tract revision entry is now complete. If there is no other validation errors and no requirement to update a Royalty Owner, skip the Royalty Owner tab and proceed to Summary tab to confirm the Working Interest Owner Summary (page 36).



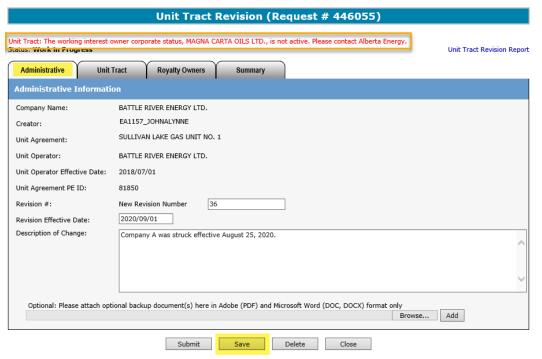
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UNIT TRACT REVISION - UNIT TRACT TAB - VALIDATION ERROR - INACTIVE WORKING INTEREST OWNER (WIO)

A unit tract revision is required when a WIO becomes inactive from the current revision. The department sends notification letter to Unit Operator advising to submit a revision. It is important that revision is submitted so that royalties are correctly assessed.

Once the request is saved after inputting Administrative data, validation error below appears: "The working interest owner corporate status, ##Company Name##, is not active. Please contact Alberta Energy and Minerals."

Proceed to the next step, i.e., enter the revision under Unit Tract tab. Once the revision is saved, this validation error disappears.

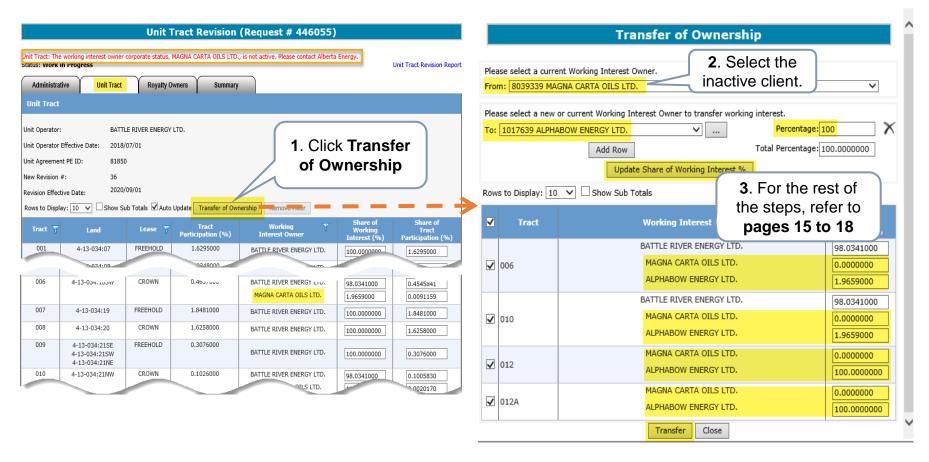


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UNIT TRACT REVISION – UNIT TRACT TAB – REPLACE INACTIVE WIO TO ACTIVE WIO





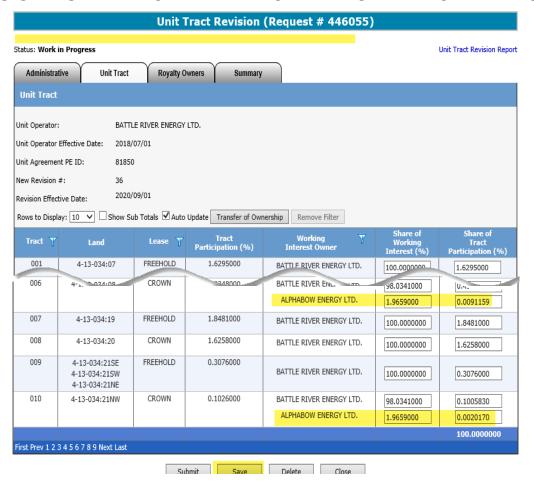
The validation error remains at the top of the screen until the inactive WIO is replaced.

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UNIT TRACT REVISION – UNIT TRACT TAB – INACTIVE WIO REPLACED AND SAVED





Once the transfer is saved, the validation error disappears. The inactive WIO is now replaced with the active WIO. Proceed to submission.

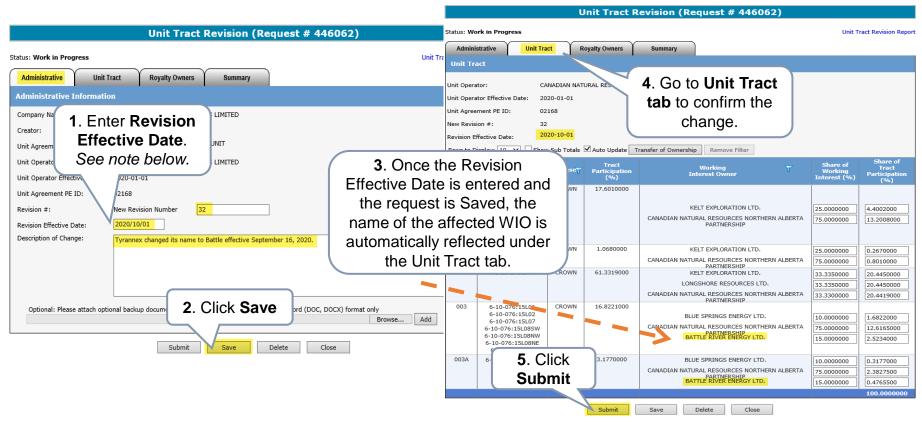


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UNIT TRACT REVISION – UNIT TRACT TAB – NAME CHANGE ON EXISTING WIO

A unit tract revision is required when an existing WIO has undergone a Name Change.

The department sends notification letter to Unit Operator advising to submit a revision. It is important that revision is submitted so that royalties are correctly assessed.





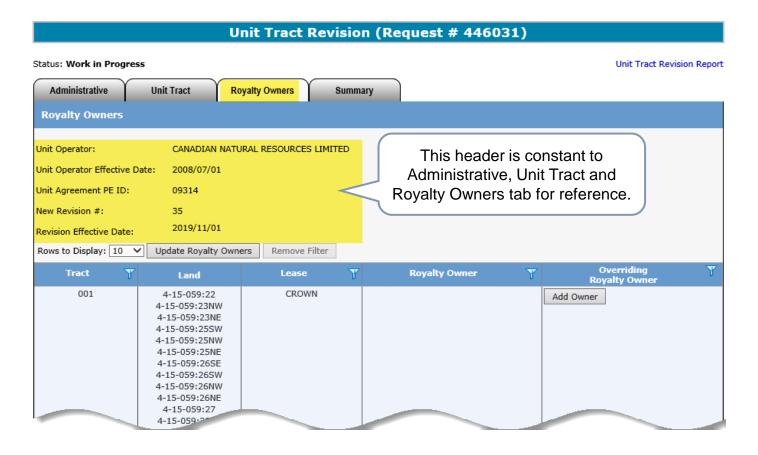
The effective date of the revision is the 1st day of the month following the name change.

For example, name change was effective September 16, 2020. The effective of the revision would be October 1, 2020.



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UNIT TRACT REVISION - ROYALTY OWNERS TAB - COPY OF CURRENT REVISION



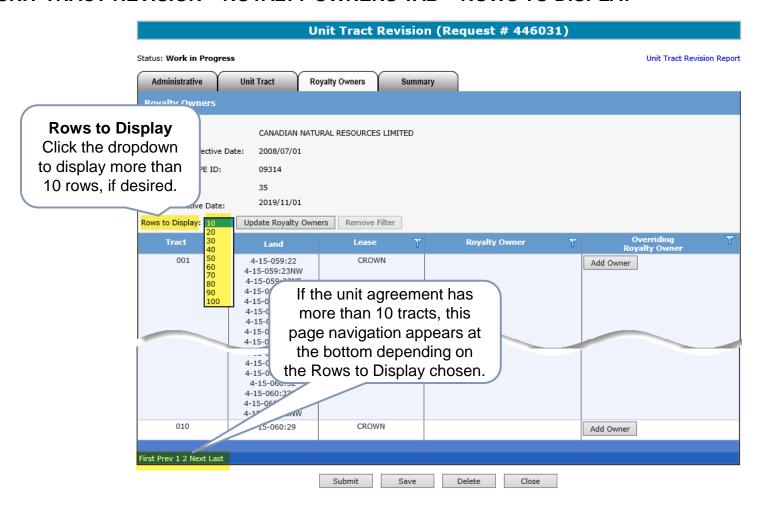
This revision is a copy of the current revision where the new revision data is updated.

Unit Operator can submit **New Revision** with <u>only</u> Royalty Owners updates. If this is the case, only the Administrative and Royalty Owners tabs are required for submission.



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UNIT TRACT REVISION - ROYALTY OWNERS TAB - ROWS TO DISPLAY

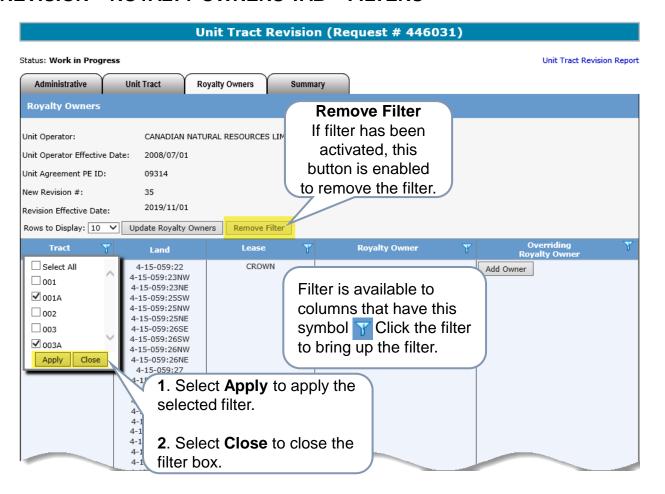


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UNIT TRACT REVISION – ROYALTY OWNERS TAB – FILTERS



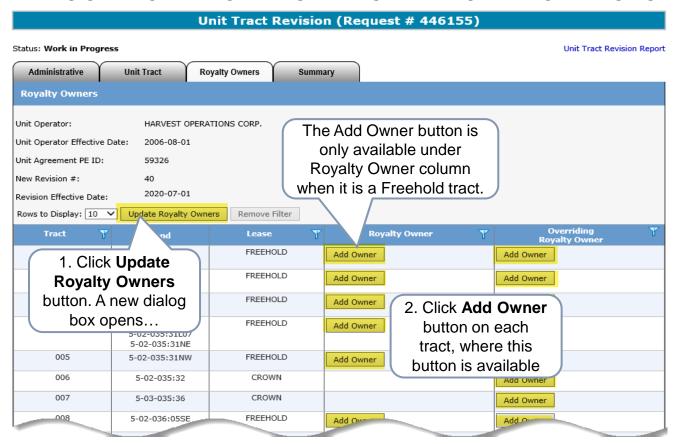


Filters are useful when there are many rows of information on a screen that you must scroll through. It allows you to narrow down the amount of information displayed.



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UNIT TRACT REVISION - ROYALTY OWNERS TAB - UPDATE ROYALTY OWNERS BUTTONS



Royalty Owners and/or Overriding Royalty Owners can be updated or added. There are two ways to update or add Royalty Owners:

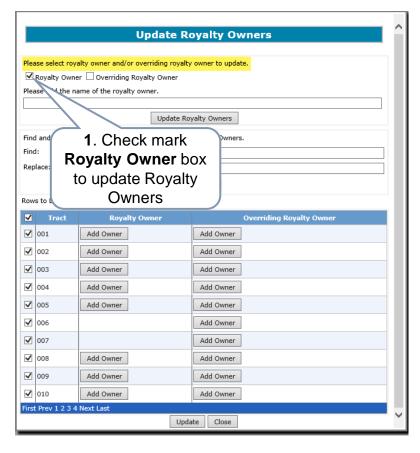


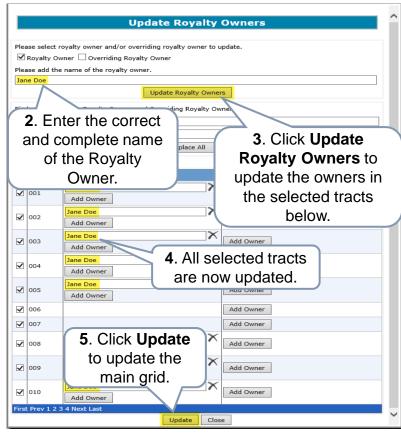
- 1. Update Royalty Owners button
- 2. Add Owner button designated on each tract



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UNIT TRACT REVISION - ROYALTY OWNERS TAB - UPDATE ROYALTY OWNERS







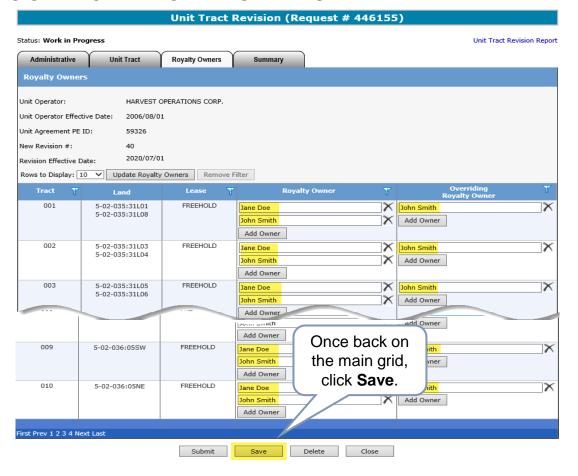
The tracts are check marked by default. You can unselect all and reselect specific tract that require update. The same steps apply to update **Overriding Royalty Owner**.

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UNIT TRACT REVISION - ROYALTY OWNERS TAB - SAVE





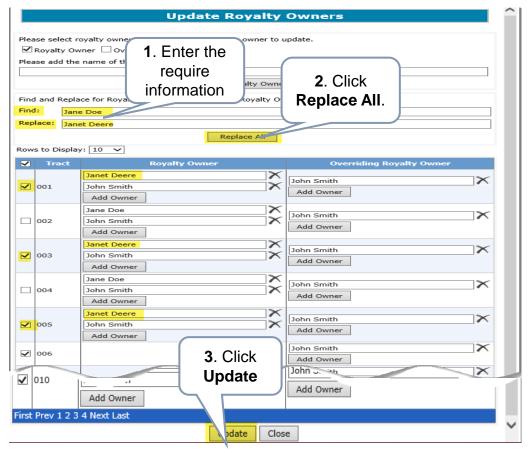
You can also update either/both Royalty Owner/Overriding Royalty Owner here by clicking Add Owner button to a specific tract. Click Save once update is done.

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UNIT TRACT REVISION - ROYALTY OWNERS TAB - UPDATE ROYALTY OWNERS - FIND/REPLACE



If only specific tract needs to be replaced, uncheck the tract that no update require before clicking Replace All.



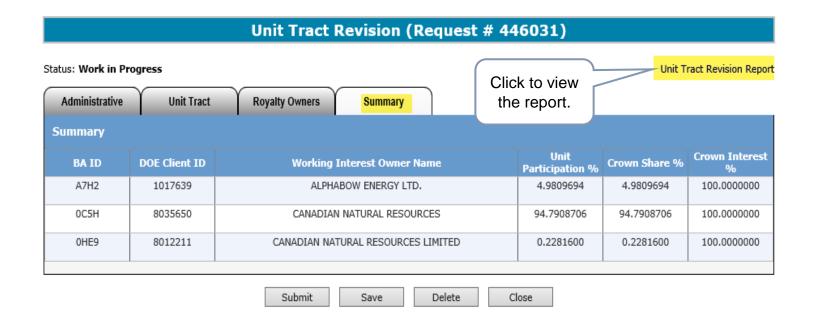
Once update is done on all 3 tabs, i.e. Administrative, Unit Tract, Royalty Owners, proceed to Summary tab for a quick review on Working Interest Owner Summary before submission.

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UNIT TRACT REVISION - SUMMARY TAB - REVIEW WIO AND REPORT





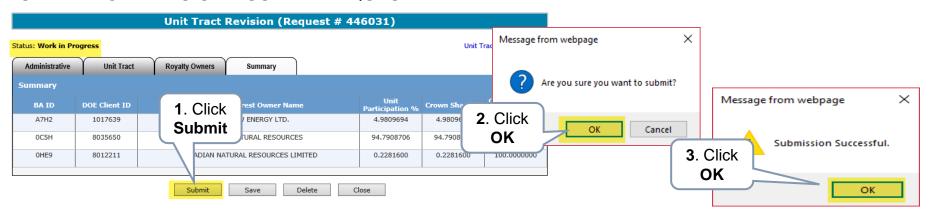
Summary tab provides summary of all WIO Unit Participation %, Crown Share % and Crown Interest %.

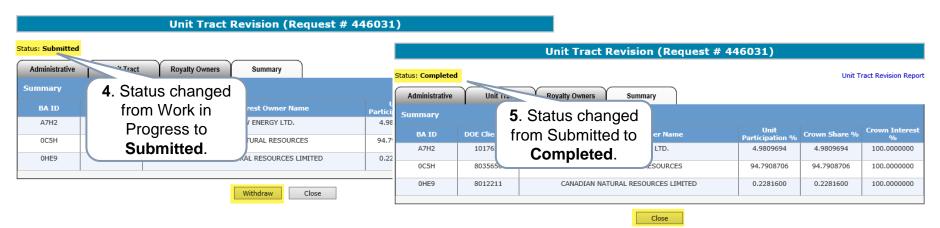
Unit Tract Revision Report is an overview of screen data, which helps in verifying data entered. This report can be generated at any time during the request's lifecycle.



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UNIT TRACT REVISION – SUBMIT REQUEST





Once the request is submitted, **Withdraw** option is enabled. You can choose to withdraw the request at this point.

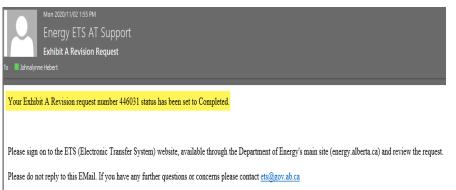
However, once the status is changed from Submitted to Completed, the withdraw option is disabled.



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UNIT TRACT REVISION – UNIT TRACT REVISION – EMAIL NOTIFICATION & WORK IN PROGRESS

An email notification is sent to the creator indicating that the request is now Completed.





Once this email notification is received, the *next step is to generate the Exhibit A report*. Refer to Reports available in our online learning portal.



The **Unit Operator** is responsible in **preparing** and **distributing** the same copy of the revised Exhibit A created in ETS to all unit parties including Alberta Energy Regulator.

The **Status** of a **Request** can be searched and viewed in the **Work in Progress** screen.



Requests that have been created will remain available in the Work in Progress for 90 days after which they are archived and then deleted.

Work in Progress									
Туре:			~	Request Number:	446031				
Start Date:				End Date:			_		
Unit Agreen Name:	nent								
PE Id:			_						
Status:			~						
Comment:									
			Find	Close					
Request #	Form Type	Status	Unit Agreement	Name	Files	PE Id	Creator		
146031	Unit Agreement Unit Tract Revision	Completed	BELLIS UNIT NO.	2	Report: Pdf	09314	EA0331_JOHNALYNNE		
Page 1									



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UNIT TRACT REVISION – CORRECTION

If **correction** is required to a previously submitted revision, please refer to **Unit Tract Correction** available in our **Online Learning** portal.

Types of correction that Unit Operator can correct electronically on revision that is either current and/or within the open year:

- *Revision #
- *Revision Effective Date
- Working Interest Owners
- Share of Working Interest %
- Share of Tract Participation %
- Royalty Owners

^{*}can only correct on current revision



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CONCLUSION

Congratulations!

You have completed the Unit Agreement Exhibit A Unit Tract Revision Online Training Course

If you have any comments or questions on this training course, please forward them to the following email address:

EnergyUnitsHelpdesk@gov.ab.ca

