



# COMPLIANCE MANAGEMENT INFORMATION SYSTEM (CM-IS)

## Permit Holder User Guide

**VERSION 3.1**

**August 2024**

# About the Regulator

The BC Energy Regulator (Regulator) is the single-window regulatory agency with responsibilities for regulating oil and gas activities in British Columbia, including exploration, development, pipeline transportation and reclamation.



The Regulator’s core roles include reviewing and assessing applications for industry activity, consulting with First Nations, ensuring industry complies with provincial legislation and cooperating with partner agencies. The public interest is protected by ensuring public safety, protecting the environment, conserving petroleum resources and ensuring equitable participation in production.

## Vision, Mission and Values

### Vision

A resilient energy future where B.C.'s energy resource activities are safe, environmentally leading and socially responsible.

### Mission

We regulate the life cycle of energy resource activities in B.C., from site planning to restoration, ensuring activities are undertaken in a manner that:



Protects public safety and the environment



Supports reconciliation with Indigenous peoples and the transition to low-carbon energy



Conserves energy resources



Fosters a sound economy and social well-being

### Values

**Respect** is our commitment to listen, accept and value diverse perspectives.

**Integrity** is our commitment to the principles of fairness, trust and accountability.

**Transparency** is our commitment to be open and provide clear information on decisions, operations and actions.

**Innovation** is our commitment to learn, adapt, act and grow.

**Responsiveness** is our commitment to listening and timely and meaningful action.

## Additional Guidance

As with all BCER documents, this manual does not take the place of applicable legislation. Readers are encouraged to become familiar with the acts and regulations and seek direction from BCER staff for clarification. Some activities may require additional requirements and approvals from other regulators or create obligations under other statutes. It is the applicant and Permit Holder's responsibility to know and uphold all legal obligations and responsibilities.

Throughout the manual there are references to guides, forms, tables, and definitions to assist in creating and submitting all required information. Additional resources include:

- [Glossary and acronym listing](#) on the BCER website.
- [Documentation and guidelines](#) on the BCER website.
- [Frequently asked questions](#) on the BCER website.
- [Advisories, bulletins, reports and directives](#) on the BCER website.
- [Regulations and Acts](#) listed on the BCER website.

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## Document Revisions

The BCER is committed to the continuous improvement of its documentation. Revisions to the documentation are highlighted in this section and are posted to the [Documentation Section](#) of the BCER’s website. Stakeholders are invited to provide input or feedback on BCER documentation to [servicedesk@bc-er.ca](mailto:servicedesk@bc-er.ca).

Version Number	Posted Date	Chapter Section	Summary of Revision(s)
0.9	February 2, 2022	Various	Initial publication, covering Administrative Non-Compliances only
1.0	November 21, 2022	Various	Updated for new features supporting Inspection Reports and Inspection Non-Compliances
2.0	March 10, 2023	Various	Added instructions to support new Data Export functions Updated branding for BC Energy Regulator
2.1	April 20, 2023	Chapter 1, 6.7, 5.74, Appendix B	Added information on new email notifications and PDF notices when a Non-Compliance has been escalated for enforcement
2.2	June 19, 2023	Chapter 5	Updated which Notices are displayed on the Non-Compliance dashboard tabs
3.1	August 28, 2024	Various	Updated for new features supporting Incidents

## Chapter 1: CM-IS Permit Holder Application Overview

The Compliance Management Information System (CM-IS) provides tools for Permit Holders and their representatives to manage incidents and non-compliances and to view inspection results.

Users of CM-IS can:

- Receive, manage, and resolve Non-Compliance Notices issued by the BCER
- Review completed inspections that may or may not have resulted in the issuance of a Non-Compliance Notice
- Receive notice when a non-compliance is escalated to enforcement
- Report incidents that meet the criteria for classification as “minor”
- Add additional documentation, interim reports, spill reports and Post Incident Reports (Form D) for all incident classifications (minor and level 1, 2 or 3)
- Monitor the status of reported incidents

### 1.1 Inspections and non-compliances

A Non-Compliance Notice includes one or more individual Non-Compliances that were discovered at the same time. Non-Compliances are the lowest tier on the BCER’s graduated Enforcement Model. They document an observed Non-Compliance and provide an opportunity for correction within a set timeline. A Non-Compliance is not a finding of contravention; although, when Non-Compliances are not addressed, they may be escalated to Enforcement. Generally, Non-Compliances are reserved for lower risk occurrences and not systemic patterns of Non-Compliance.

Non-Compliance Notices are not intended to replace the Permit Holder’s responsibility of identifying and maintaining legislative compliance within their operational requirements. Permit Holders are expected to understand and manage their compliance on a regular basis. When Non-Compliances have been found, Permit Holders are also expected to correct them within the specified timeframe. Where patterns of Non-Compliance are observed, alternate approaches to ensuring compliance maintenance will be considered by the BCER.

## 1.1.1 Identifying a Non-Compliance

A Non-Compliance may be identified during an Administrative Verification or Inspection process. In such cases, the BCER will create a Non-Compliance record, which will be presented on a Non-Compliance Notice. The Non-Compliance Notice will be sent to the Permit Holder at the time of issuance. Each individual Non-Compliance, contained on a Non-Compliance Notice, will identify what is in Non-Compliance, the legislation that is being enforced against the Non-Compliance, and the required Correction Due Date.

## 1.1.2 Non-Compliance Process Overview

The Non-Compliance Notice process includes the following basic steps:

- 1) The Permit Holder will receive a Non-Compliance Notice, listing one or more Non-Compliances, via email and then accesses CM-IS for more information.
- 2) If needed, the Permit Holder submits a Request for Clarification Submission or a Request for Extension Submission via the CM-IS Permit Holder Application.
- 3) The Permit Holder corrects the Non-Compliance and then, depending on the nature of the Non-Compliance, submits the required documentation via the appropriate process and system, such as KERMIT, eSubmission, Petrinex, or via a specified email account. **Submitting these documents via CM-IS will not resolve the Non-Compliance.**
- 4) The Permit Holder submits a Respond to Non-Compliance Submission in CM-IS, indicating how the requirement has been met.
- 5) The BCER reviews the Permit Holder's Respond to Non-Compliance Submission and either accepts it or requests more information. The BCER may also retract the Non-Compliance if it was issued in error or if the Permit Holder has received an exemption.
- 6) If the Non-compliance is not resolved to the satisfaction of the BCER, then the Permit Holder will receive notice that the Non-Compliance has been escalated to Compliance and Enforcement for investigation. BCER staff will contact the Permit Holder to discuss the outstanding issues.

## 1.1.3 Inspection and Non-compliance System Features

For any given Issued Non-Compliance, Permit Holders can interact with the BCER through a CM-IS Request for Clarification, a Request for Extension, or a Respond to Non-Compliance Submission. Each interaction involves the Permit Holder submitting a Non-Compliance Submission followed by an answer

from the BCER. Once the BCER has answered, the Non-Compliance Submission is marked as 'Complete.' Further interaction requires a new Non-Compliance Submission.

Only one interaction per Non-Compliance can be open at a time. If a submission in CM-IS needs to be revised, it can be retracted and replaced with another if it has not already been acted upon by BCER staff.

Supporting documentation can be added via Notebook tab. Information attached by the BCER staff will also appear on this tab. Information in the Notebook is specific to the request or response that it is associated with. The Log tab summarizes all communication that has happened for a Non-Compliance.

Notifications are sent via email when BCER staff initiate a Non-Compliance Notice or answer a Non-Compliance Submission in CM-IS. These notifications are sent to:

1. All 'Administrative Non-Compliance Representatives' or 'Inspection Representatives' (see section 1.4 Security Roles below), or if no one has this role then,
2. 'Company Administrator', or if no one has this role or the role above then,
3. Main Company Contact.

## 1.2 Incidents

Spills and other reportable incidents must be reported as described in the [Incident Reporting Instructions and Guidelines](#). Incidents classified as "minor" should be reported by the permit holder using CM-IS within 24 hours. Level 1, 2, or 3 incidents must be reported to the BCER (within 1 hour) through the Emergency Management and Climate Readiness (EMCR) incident reporting line at 1-800-663-3456, and the information will be entered into CM-IS by BC-ER staff based on the information provided during the call. All incidents are managed using CM-IS.

### 1.2.1 Incident process overview

**Note: This is an interim process for the September release of the CM-IS Incidents Module. An updated version will be released in early 2025 and this process will be revised to reflect new features.**

- 1) The permit holder assesses the incident using the classification matrix
- 2) If the incident is classified as level 1, 2 or 3 then it must be reported to EMCR at 1-800-663-3456. Leveled incidents are entered into CM-IS by BC-ER staff based on reported information.

- 3) If the incident is classified as “minor” then the permit enters the details using the “Create Incident” function, making sure to include the Incident Classification Matrix on the Notebook tab. If the minor incident includes a spill, then it must be reported to EMCR and the resulting DGIR number must be entered in CM-IS.
- 4) The permit holder adds information in CM-IS about key contacts and supporting documents as required
- 5) BCER staff review the incident and notify the permit holder’s key contacts via email if Spill Report(s) or a Post Incident Report (Form D) is required and provide due date for submission
- 6) The permit holder submits reports and additional information as required using the Notebook tab.
- 7) BC-ER staff will review the Spill Report and/or Post Incident Report and notify the permit holder if further action is required.

## 1.2.2 Incidents System Features

**Note: The September release of the CM-IS Incidents Module does not include the full functionality anticipated for the final version. An updated version will be released in early 2025 to include additional capabilities.**

Unlike the Inspection and Noncompliance component of CM-IS, the current version of the Incidents system does not include any communication, workflow or notification functions. Until the final release users will continue to communicate with BC-ER staff using phone or email.

The current version also does not include a dashboard for incidents; however, users can use the “search” link to find and view incidents including draft reports that have not yet been submitted.

Only “minor” incidents can be entered by the permit holder, level 1-3 incidents must be reported by telephone to EMCR at 1-800-663-3456.

Incident data cannot be edited after it has been submitted by the permit holder, except for contact information. Documents can be added to the Notebook tab at any time.

Any required or requested documents should be added to the Notebook tab for the incident file. The BCER may also add information to the notebook such as site visit images, email communications, and notes.

A second major release to CM-IS planned for early 2025 will add communication capabilities similar to those in the Inspections and Non-compliance component, as well as replacing uploaded forms with direct data entry into the system.

## 1.3 Security Roles

To receive notifications and access CM-IS users will need to have one of the following security roles. These roles are assigned by the Permit Holder's Company Administrator. Refer to the BCER website for more information on managing security roles for Online Systems.

**Inspection Representative:** view inspection reports and view, manage and respond to Non-Compliance Notices identified via a field inspection.

**Administrative Non-Compliance Representative:** view, manage and respond to Non-compliance notices identified via an administrative review.

**Incident Reporting:** submit reports for minor incidents, and view, manage and monitor level 1-3 incidents that have been reported to Emergency Management BC.

## 1.4 Important Terms

**Non-Compliance** - A single instance of an alleged failure to conform to legislation. Each Non-Compliance is associated with one legislative requirement and a one Activity, Permit, Special Project Order or Permit Holder.

**Non-Compliance Notice** - A Notice to the Permit Holder identifying one or more instances of Non-Compliance. When working in CM-IS a Non-Compliance Notice represents a group of one or more Non-Compliances that share a common Permit Holder and Discovery Date. All the Non-Compliances associated with a specific Non-Compliance Notice will be communicated to the Permit Holder at the same time.

**Inspection report** – A document summarizing the time, location, activities inspection and outcome of a field inspection.

**Correction Duration** - The period, between Notice issuance and the Non-Compliance's original Correction Due Date, during which the Permit Holder must address the Non-Compliance. Initially set at 24 hours, 14 days, or 30 days depending on the type of Non-Compliance.

**Non-Compliance Submission (in CM-IS)** - A communication from the Permit Holder to the BCER in CM-IS. There are three types of CM-IS Submissions: Request for Clarification, Request for Extension, and Respond to Non-Compliance.

**Operational Submission** - A form, report or other document that is required by legislation to be submitted to the BCER. This information is not to be submitted via CM-IS, rather it needs to be submitted using eSubmission, KERMIT, email, or other means.

**Make special note of the distinction between the following two documents that may be provided to the Permit Holder as an email attachment:**

A **Non-compliance Notice Completed Letter** informs the Permit Holder that a non-compliance has been resolved to the satisfaction of the BCER.

A **Non-compliance Notice Escalated Letter** informs the Permit Holder that a non-compliance **has not** been addressed to the satisfaction of the BCER. The Permit Holder should expect to be contacted by BCER to discuss further steps towards achieving compliance.

## 1.5 User Support

The current version of this document, along with other information for users is available on the BCER website. User support requests should be sent to [servicedesk@bc-er.ca](mailto:servicedesk@bc-er.ca).

## Chapter 2: Accessing CM-IS Permit Holder Application

CM-IS provides a portal, called the CM-IS Permit Holder Application, for all a Permit Holder’s compliance related interactions with the BCER.

### 2.1 Log In

Open either the Google Chrome or Microsoft Edge web browser. (No other web browsers are supported at this time.)

Access to the CM-IS Permit Holder Application is provided via the link [www.cmis-ph.bc-er.ca](http://www.cmis-ph.bc-er.ca)

The image shows a screenshot of the BCER (British Columbia Energy Regulator) Log In page. At the top is the BCER logo, which consists of the letters 'BCER' in a stylized font with a green and blue bar behind the 'C'. Below the logo is the text 'BRITISH COLUMBIA ENERGY REGULATOR'. The main heading is 'Log In'. Below this are two input fields: 'Username' and 'Password'. At the bottom is a blue button labeled 'Sign In'.


To Log In

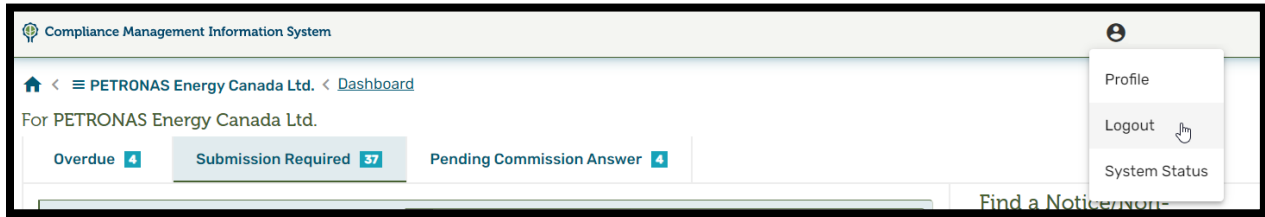
1. Enter the external username provided by the BCER
2. Enter the corresponding password
3. Select Sign In

### 2.2 Log Out

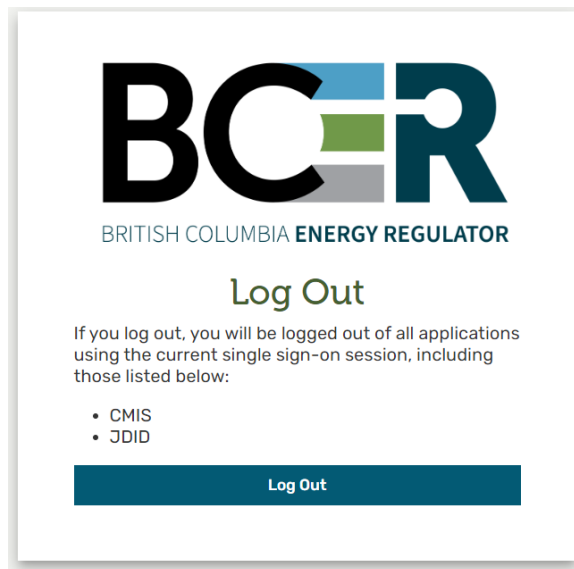
To log out of CM-IS:



1. Select the  Icon
2. Select the Log Out option



3. Click on Log Out



**Please Note:**

The timeout period for the application is 10 hours. If the application has been idle for 10 hours, with the user still logged in, the system will log the user out of the application.

## 2.3 Security Roles

Permit Holder representatives are assigned specific Security Roles so that they may access CM-IS and perform specific tasks.

The following Security Roles are defined for the Permit Holder representatives and are designated by the Permit Holders Company Administrator.

- Administrative Non-Compliance Representative
  - Allows users to receive Administrative Verification Non-Compliance Notices and to respond to Administrative Verification Non-Compliances
- Inspection Representative
  - Allows users to receive Inspection Reports and Inspection Non-Compliance Notices and to respond to Inspection Non-Compliances
- Incident Reporting
  - Allows users to submit Minor Incidents, and view Minor and Levelled Incidents

## Chapter 3: Select or Change an Organization

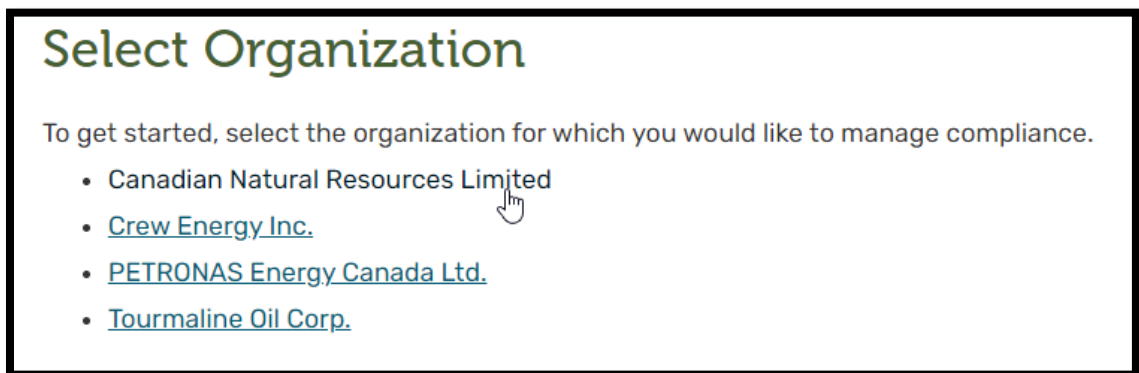
Once logged into CM-IS, the 'Administrative Non-Compliance Representative' and/or 'Inspection Representative' will be able to view a list of all Organizations they represent.

### Please Note:

If the user only has access to one Organization, CM-IS will automatically default to this Organization and the user will not be able to select or change their Organization.

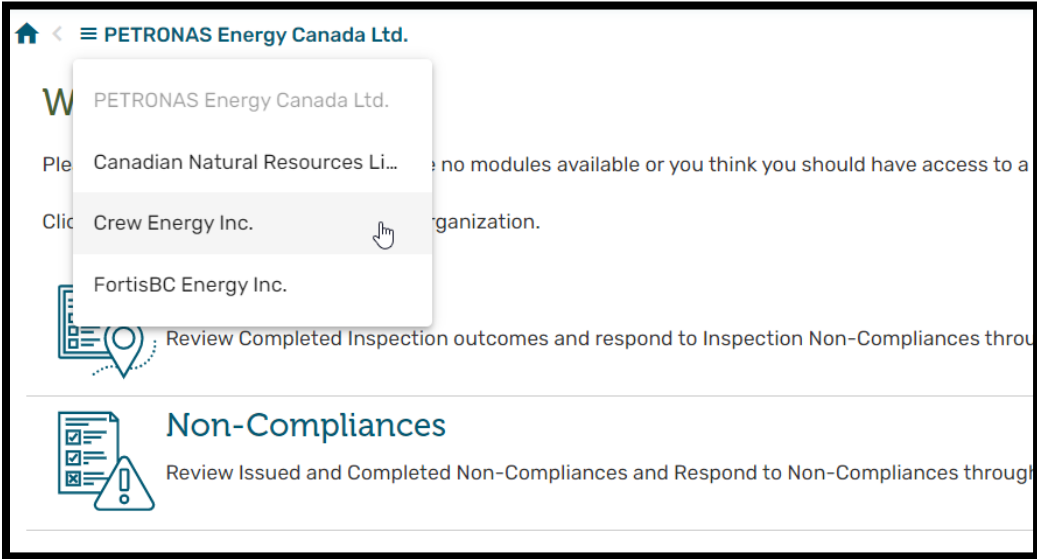
### 3.1 Select an Organization

Select an Organization by clicking on any Organization in the list



### 3.2 Change an Organization

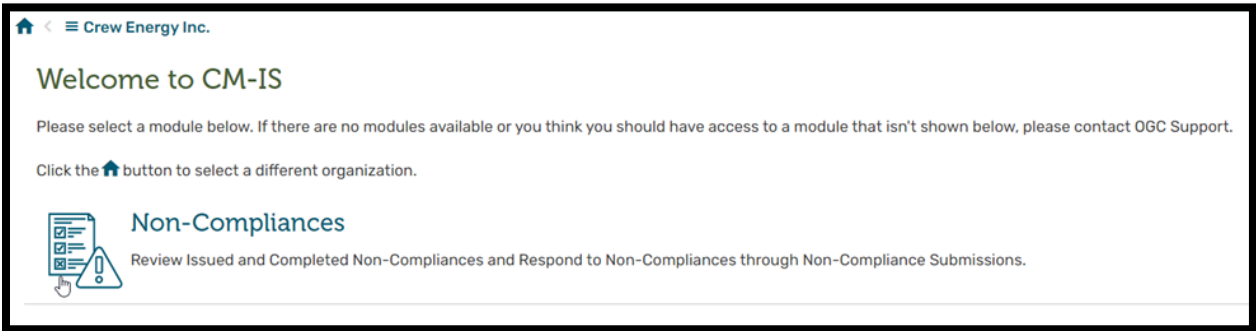
At any time while logged into CM-IS, switch between Organizations by clicking on the Organization Name in the bread crumb at the top of the page and selecting a different Organization.



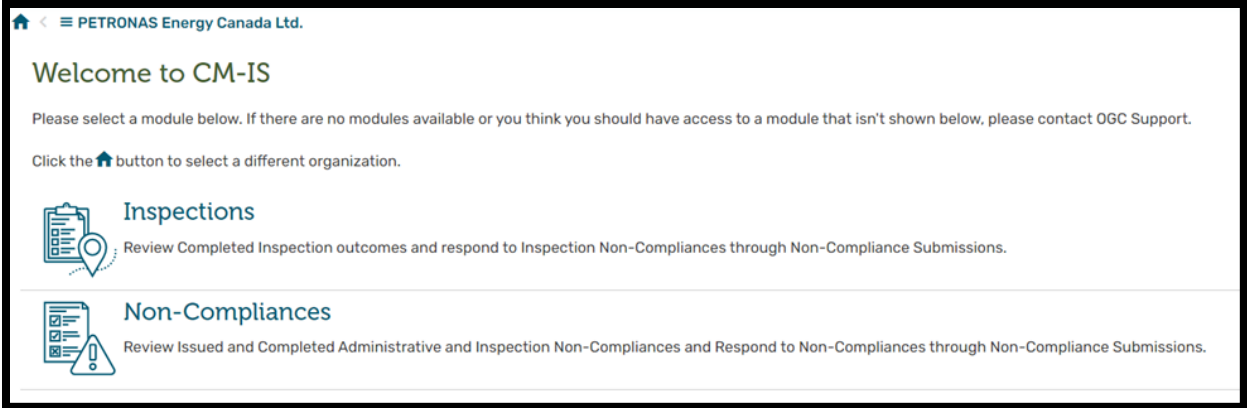
# Chapter 4: Choosing the Inspections, Non-Compliances, or Incidents module

Once the user has chosen an Organization, they will have access to the Inspections, Non-Compliances, and/or Incidents modules based on their security role.

Users with the **Administrative Non-Compliance Representative role** will be able to click on the Non-Compliance module where they can view Issued and Completed Non-Compliance Notices and Non-Compliances and respond to them through Non-Compliance Submissions.




Users with the **Inspection Representative role** will be able to select either the Inspections or the Non-Compliances module. In the Inspections module, the user can review Completed Inspections and any Issued and Completed Non-Compliance Notices for those Inspections and Non-Compliances as well as respond to them through Non-Compliance Submissions. They also can go directly to the Non-Compliance Notices issued for the Inspections through the Non-Compliance module.




Users with the **Incident Reporting role** will be able to select the Incidents module, where they can submit Minor Incidents and view existing Minor and Leveled Incidents.

**Welcome to CM-IS**


Please select a module below. If there are no modules available or you think you should have access to a module that isn't shown below, please contact BCER Support.

Click the  button to select a different organization.


---

 **Inspections**  
Review Completed Inspection outcomes and respond to Inspection Non-Compliances through Non-Compliance Submissions.

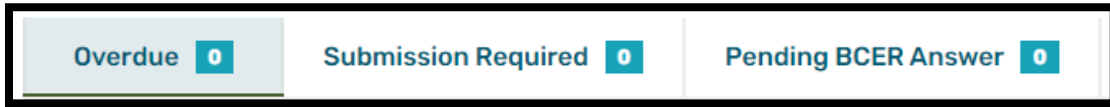
---

 **Non-Compliances**  
Review Issued and Completed Administrative and Inspection Non-Compliances and Respond to Non-Compliances through Non-Compliance Submissions.

---

 **Incidents**  
Create and review Incidents.

## Chapter 5: Using the Non-Compliance Dashboard

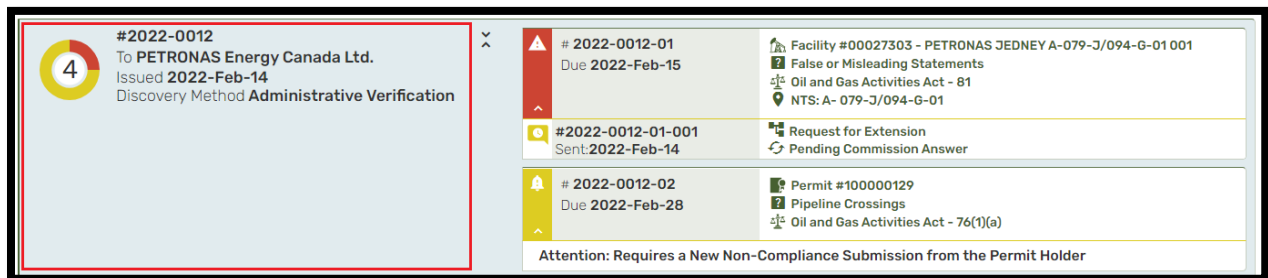


There are three dashboard lists, which display Non-Compliance Notices that have been sent to the Permit Holder and which currently have the STATUS of ‘Issued.’

1.	Overdue	Lists Issued Non-Compliance Notices with one or more overdue Non-Compliance(s) which require action (in the form of a Submission) from the Permit Holder.
2.	Submission Required	Lists Non-Compliance Notices without any overdue Non-Compliances and which have at least one Issued Non-Compliance that needs a Submission from the Permit Holder. A Non-Compliance with a Draft Submission is included on this list since it has not yet been sent to the BCER.
3.	Pending BCER Answer	Lists the Issued Non-Compliance Notices where all of the Issued Non-Compliances have a Pending BCER Answer Submission, whether they are overdue or not.

Users are also able to search for a specific Non-Compliance Notice, search for a specific Non-Compliance, search for a specific a Non-Compliance Submission, search for a Non-Compliance using multiple criteria, and export a CSV file containing all Permit Holder’s Non-Compliances (see Chapter 11 for exporting Non-Compliances).

### 5.1 Non-Compliance Notice Information



Non-Compliance Notice information includes the following:

#2022-0012 **A**  
 To **PETRONAS Energy Canada Ltd. B**  
 Issued **2022-Feb-14 C**  
 Discovery Method **Administrative Verification D**

- A. The Non-Compliance Notice Number
- B. The Permit Holder's Organization Name
- C. The date the Non-Compliance Notice was issued to the Permit Holder
- D. The method used by the BCER to discover the Non-Compliance

## 5.2 Non-Compliance Information

Information about each of a Notice's individual Non-Compliances are displayed along with the Notice.

#2022-0012 To <b>PETRONAS Energy Canada Ltd.</b> Issued <b>2022-Feb-14</b> Discovery Method <b>Administrative Verification</b>	# 2022-0012-01 Due 2022-Feb-15	Facility #00027303 - PETRONAS JEDNEY A-079-J/094-G-01 001 False or Misleading Statements Oil and Gas Activities Act - 81 NTS: A- 079-J/094-G-01
	#2022-0012-01-001 Sent:2022-Feb-14	Request for Extension Pending Commission Answer
	# 2022-0012-02 Due 2022-Feb-28	Permit #100000129 Pipeline Crossings Oil and Gas Activities Act - 76(1)(a)

Attention: Requires a New Non-Compliance Submission from the Permit Holder

Non-Compliance information includes the following:

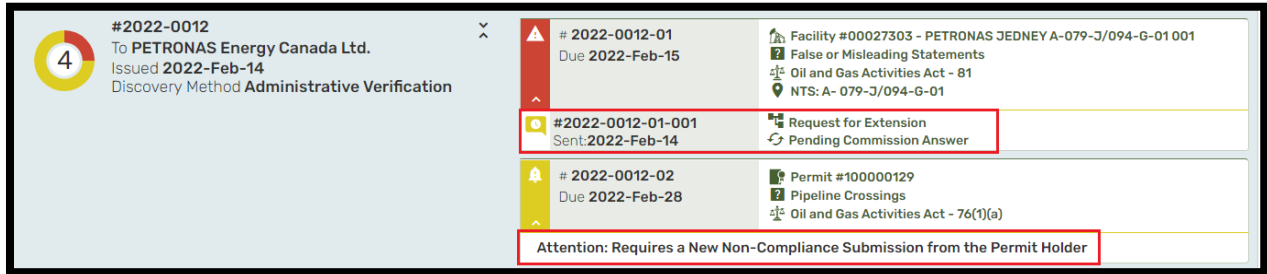
# 2022-0012-01 <b>A</b>	<b>C</b>	Facility #00027303 - PETRONAS JEDNEY A-079-J/094-G-01 001
Due 2022-Feb-15 <b>B</b>	<b>D</b>	False or Misleading Statements
	<b>E</b>	Oil and Gas Activities Act - 81
	<b>F</b>	NTS: A- 079-J/094-G-01

- A. Following the Non-Compliance Notice's Number is the Non-Compliance Number, beginning with 01, and incrementing by one, if there are more than one Non-Compliance on the Non-Compliance Notice
- B. The date the Non-Compliance must be addressed by
- C. The Activity's, Permit's, or Special Project Order's Business Identifier or the Name of the Permit Holder
- D. The Reason attributed to the creation of the Non-Compliance
- E. The Legislation that is being enforced



F. If available, the location of the identified Activity

### 5.3 Non-Compliance Submission Information



The Non-Compliance Submission includes information about a Non-Compliance Submission that the Permit Holder representative has requested from CM-IS, including the following:

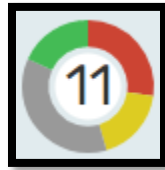


- A. Following the Non-Compliance Notice Number and the Non-Compliance Number, is the Non-Compliance Submission Number, beginning with 01, and incrementing by one, if there are more than one Submission for the Non-Compliance
- B. The date the Non-Compliance Submission was submitted by the Permit Holder Representative
- C. The type of Non-Compliance Submission
- D. The Outcome of the Non-Compliance Submission
- E. The presence of the paperclip icon indicates that one or more files are attached to the Non-Compliance Submission

### 5.4 Presentation Order

Within each Non-Compliance Notice, the listed Non-Compliances are presented in ascending Non-Compliance Number order.

## 5.5 The Rondel



The colour coded rondel situated to the left of the Non-Compliance Notice information displays the following information about the Non-Compliance Notice and its Non-Compliances.

- The number in the centre of the rondel is the total number of Non-Compliances on the Non-Compliance Notice
- The coloured ring represents the mix of Non-Compliance statuses. The colour codes are represented as follows:
  - One or more Non-Compliances are Overdue (in red ■)
  - One or more Non-Compliances are due within the next 7 days (in yellow ■)
  - One or more Non-Compliances are due in more than 6 days (in grey ■)
  - One or more Non-Compliances are Complete (in green ■)

## 5.6 Searching for a Non-Compliance

To find a specific Non-Compliance Notice, a Non-Compliance, or a Non-Compliance Submission, enter the corresponding number into the GO TO NOTICE/NON-COMPLIANCE/SUBMISSION field under the 'Find a Notice/Non-Compliance/Submission' banner.

- To find a Non-Compliance Notice, enter its number, for example 2021-0001
- To find a Non-Compliance, enter its number, for example 2021-0001-01
- To find a Non-Compliance Submission, enter its number, for example 2021-0001-01-001

**Find a Notice/Non-Compliance/Submission**

---

GO TO NOTICE/NON-COMPLIANCE/SUBMISSION

If the number cannot be found, an error message will appear:

The screenshot shows a search interface with the title "Find a Notice/Non-Compliance/Submission". Below the title is a horizontal line, followed by the text "GO TO NOTICE/NON-COMPLIANCE/SUBMISSION". There is a search input field containing "2022-1000" and a "Go" button. A red error message "Notice/Non-Compliance/Submission number not found" is displayed below the input field.

## 5.7 Using the Advanced Non-Compliance Search Screen

The Non-Compliance Search screen is a searchable and sortable tabular list of Non-Compliances.

Access the Non-Compliance Search screen from the Non-Compliance Dashboard, under the 'Find a Notice/Non-Compliance/Submission' banner, by selecting the [Search Non-Compliances](#) link.

The screenshot shows the same search interface as above. Below the "Go" button, there is a "Search" section with a horizontal line. A link "Search Non-Compliances" is highlighted with a red box. Below this, there is an "Export" section with a horizontal line, containing two links: "Non-Compliances" and "Non-Compliances and Submissions".

When opened, the Non-Compliance Search screen will default to displaying information about Non-Compliances that have been 'Issued' to the currently selected Permit Holder (*as selected when the user logged on or subsequently changed*).

NC NUMBER	LEGISLATION	SECTION	STATUS	ACTIVITY TYPE	ACTIVITY ID	PERMIT NUMBER	ASSIGNED TO	DUE DATE	RESPONSE	OUTCOME
2021-0272-02	Drilling and Production Regulation	90(5)(i)	Issued	ADGA/ANC	0020763	10016044	Eric Ney	2021-Nov-18		
2021-0272-03	Drilling and Production Regulation	90(5)(i)	Issued	ADGA/ANC	0020763	10016044	Eric Ney	2021-Nov-18		
2021-0272-04	Drilling and Production Regulation	90(5)(i)	Issued	ADGA/ANC	0020764	10016044	Eric Ney	2021-Nov-18		
2021-0295-02	Drilling and Production Regulation	90(5)(i)	Issued	ST&I	0003750	10007701	Darin Leung	2021-Nov-19		
2021-0265-01			Issued			100105241	Eric Ney	2021-Nov-20		
2021-0282-06			Issued	CARG	0002063	100077023	Eric Ney	2021-Nov-23		
2021-0174-01			Issued	Well	01130	100009170	Clare Connolly	2021-Nov-24		
2021-0174-02			Issued	Facility	0003276	100101408	Clare Connolly	2021-Nov-24		
2021-0296-01			Issued	Facility	0000854	100011837	Darin Leung	2021-Nov-27		
2021-0292-01			Issued	SPO	01-01-012		Darin Leung	2021-Nov-27		

### 5.7.1 Column Header Definitions

The Non-Compliance search screen presents rows of Non-Compliance information, with each row containing the following:

**NC NUMBER:** Represents the unique number assigned to a Non-Compliance after it has been 'Issued', presented in the format of YYYY-NNNN-NN, where YYYY-NNNN is the Notice Number that the Non-Compliance is on and -NN is the individual Non-Compliance Number.

**LEGISLATION:** Describes either the Act or Regulation that is being enforced against the Non-Compliance.

**SECTION:** Is the specific Section of Legislation that is being enforced against the Non-Compliance.

**STATUS:** Describes the current state of the Non-Compliance, either Issued or Completed.

**ACTIVITY TYPE:** Displays what the Non-Compliance is being issued against, when the Non-Compliance is against an Oil and Gas Activity.

**ACTIVITY ID:** Displays the identifier of the Activity that the Non-Compliance is being issued against.

**PERMIT NUMBER:** Identifies Permit Number assigned to the Permit at application time.

**ASSIGNED TO:** Identifies the BCER user that is currently assigned to the Non-Compliance.

**DUE DATE:** The Correction Due Date is the date by when the Permit Holder must have resolved the Non-Compliance.

**RESPONSE:** If the Permit Holder has not responded to the Non-Compliance in some way, the presence of an icon in the Response column indicates that the Non-Compliance requires a new Non-Compliance Submission from the Permit Holder.

**OUTCOME:** If a Non-Compliance has been completed, the Outcome will identify how the Non-Compliance was dealt with.

## 5.7.2 Search Features

The Non-Compliance Search screen offers the flexibility to either find one specific Non-Compliance, or a group of Non-Compliances, depending on the selected search criteria. The default for the search screen is “The 'Issued' Non-Compliances, for the Organization I have selected.”

Each column of data on the search screen is equipped with a search icon. When selected, a search box will be displayed. Every column of information is represented by a unique type of search box, tailored for the information contained in that column. There are three types of search boxes:

### Type-ahead Search Box


The type-ahead search box is used to either find a specific value, or groups of value, when only partial search information is known.

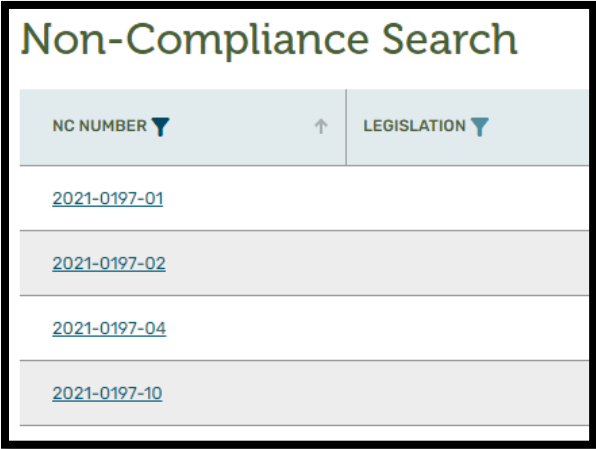
To search for a specific Non-Compliance, select the  icon, situated to the right of the column header.




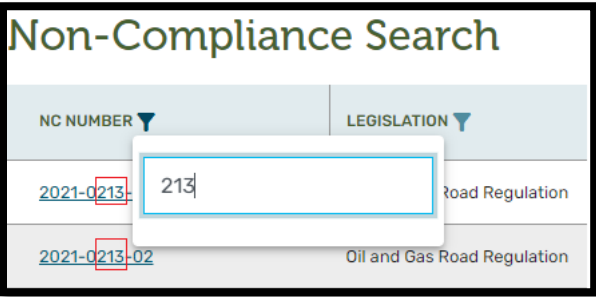
Once the type-ahead search box opens, enter any numerical value that matches the Non-Compliance that is the target of the search.




The results of the search will be displayed. To remove the type-ahead search box, either click the  icon again, or click anywhere on the screen.



To search for a group of Non-Compliances, select the  icon, situated to the right of the NC NUMBER column, and once the type-ahead search box opens, enter any numerical value that matches the Non-Compliance that is the target of the search. The results of the search will be displayed.




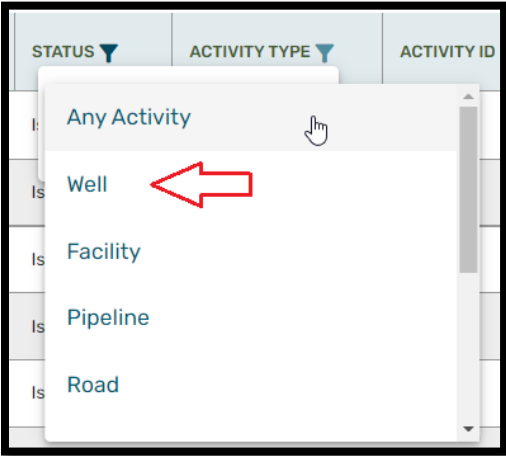
To remove the type-ahead search box, either click the  icon again, or click anywhere on the screen.

By clearing the value of a type-ahead search box, the affect will be like selecting all values within the list.

### Drop-Down List Search Box

The drop-down list search box is used when there is a limited list of values that can be selected.

To search for Non-Compliances that meet specific criteria, first start by selecting the  icon, situated to the right of the column header.



Select one of values presented in the drop-down list. The list of Non-Compliances will match with the selected value.

STATUS 	ACTIVITY TYPE 	ACTIVITY ID 
Issued	Well	02463
Issued	Well	26474

### Please Note:

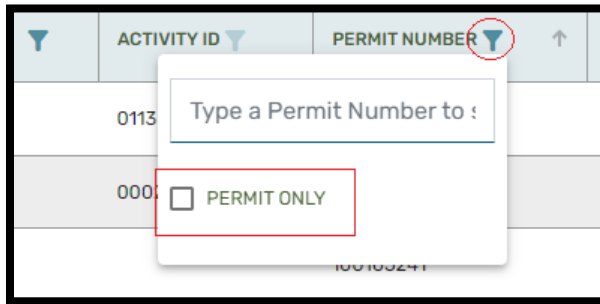
To activate the ACTIVITY ID filter, an ACTIVITY TYPE must be selected first.  
To activate the SECTION filter, a LEGISLATION must be selected first.

### Toggle (Checkbox) Search

The checkbox search box is a quick way to toggle on and off specific search parameters. There are four toggle searches.

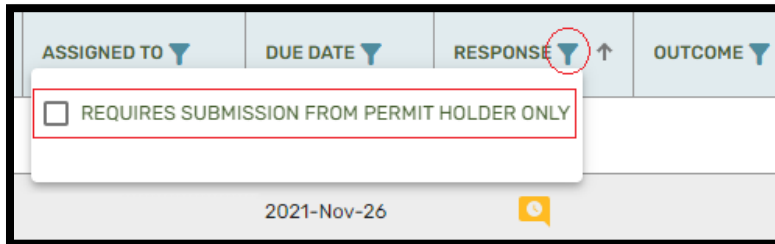
#### Permit Only:

To toggle search functionality to view only Non-Compliances that are being enforced against a PERMIT, select the  PERMIT ONLY checkbox from the PERMIT NUMBER column.



#### Requires Submission from Permit Holder Only:

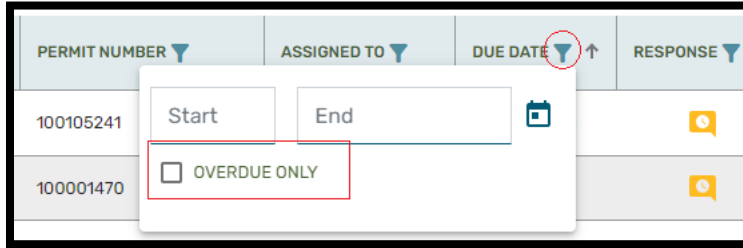
To toggle search functionality to view only Non-Compliances that require the Permit Holder to create a Non-Compliance Submission, select the  REQUIRES SUBMISSION FROM PERMIT HOLDER ONLY checkbox from the RESPONSE column.



#### Overdue Only:


To toggle search functionality to view only Non-Compliances that are currently overdue, select the  OVERDUE ONLY checkbox from the DUE DATE column.






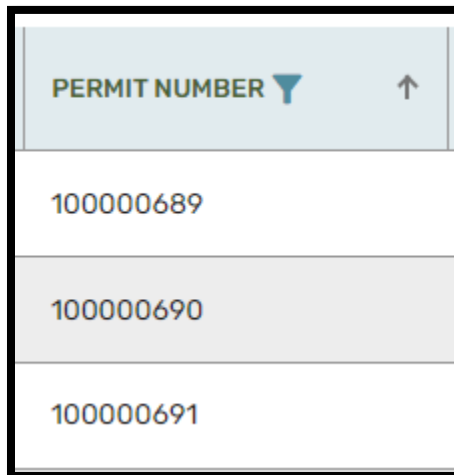
### 5.7.3 Sort Features


Each of the columns in the Non-Compliance search screen can be sorted, either ascending (lowest to highest), or descending (highest to lowest), based on the values that are currently in the column. The default sort order is ascending.

There are two options to sort any column: Sort using the  icons, or sort using the column header.



#### Sort by Sort Icon

Sort by clicking the sort icon , which is located at the far right of the column header. In the example below, the PERMIT column is being sorted, in ascending order.







To sort the values in the column, descending, click the sort icon again to trigger the descending sort , the values in the column will now be sorted from highest to lowest.

### Sort by Column Header

Columns of data can also be sorted by clicking the column header. Notice that when clicking the column header, the sort icon will change direction, indicating if the sort is ascending , or descending .

### LEGISLATION and SECTION Sorting

When sorting by the LEGISLATION or SECTION, the display will group all SECTIONS with the same LEGISLATION together and sort the SECTIONS alphabetically within the LEGISLATION group. The LEGISLATION groups themselves are not sorted.

NC NUMBER 	LEGISLATION 		SECTION 
<a href="#">2022-0059-06</a>	Oil and Gas Activities Act	LEGISLATION Group	21(a)(i)
<a href="#">2022-0059-07</a>	Oil and Gas Activities Act		21(a)(i)
<a href="#">2022-0059-08</a>	Oil and Gas Activities Act		21(a)(i)
<a href="#">2022-0040-06</a>	Drilling and Production Regulation	LEGISLATION Group	10(1)(a)
<a href="#">2022-0040-07</a>	Drilling and Production Regulation		10(1)(a)
<a href="#">2022-0040-08</a>	Drilling and Production Regulation		10(1)(a)
<a href="#">2022-0059-09</a>	Pipeline Crossings Regulation		2(3)(a)(i)

*Note: Red boxes highlight the LEGISLATION and SECTION columns. A red arrow points to the SECTION column with the text 'SECTION Sort'.*

### ACTIVITY TYPE and ACTIVITY sorting

When sorting by the ACTIVITY TYPE, the display will group all ACTIVITY IDS with the same ACTIVITY TYPE together and sort the ACTIVITY TYPE alphabetically. The ACTIVITY IDS within each group are not sorted. Those Non-Compliances without an ACTIVITY TYPE (e.g., the Non-Compliance is for the Permit, Special Project Order, or Permit Holder) are grouped at the bottom of the list with blank ACTIVITY TYPE entries.

It is not advised to sort by ACTIVITY ID at this time because the sort is based on an internal number representing the ACTIVITY ID and not the one displayed on the search result screen. Clicking on the sort arrows will produce what seems to be a randomly sorted ACTIVITY ID list, but it is actually sorting on the internal number representing the ACTIVITY ID.

## 5.7.4 Using the Search Criteria Menu

The Criteria Menu is a single source collection of all searchable data elements for the Non-Compliance Search Screen.

Open the Criteria Menu by selecting the  button from the Non-Compliance Search Screen.

### Criteria Definitions

Just like the Non-Compliance search screen, the Criteria menu has the same set of data fields that can be used to change the search criteria.

**NC NUMBER:** Represents the unique business number assigned to a Non-Compliance after it has been 'Issued', presented in the format of YYYY-NNNN-NN, where YYYY-NNNN is the Notice Number that the Non-Compliance is on and -NN is the individual Non-Compliance Number.

**LEGISLATION:** Describes either the Act or Regulation that is being enforced against the Non-Compliance.

**SECTION:** Is the specific Section of Legislation that is being enforced against the Non-Compliance.

**STATUS:** Describes the current state of the Non-Compliance, either Issued or Completed.

**ACTIVITY TYPE:** Displays what the Non-Compliance is being issued against, when the Non-Compliance is against an oil & gas activity.

**ACTIVITY ID:** Displays the identifier of the Activity that the Non-Compliance is being issued against.

**PERMIT NUMBER:** Identifies the Permit Number assigned to the Permit at application time.

**ASSIGNED TO:** Identifies the BCER user that is currently assigned to the Non-Compliance.

**DUE DATE:** The Correction Due Date is the date in which the Permit Holder must resolve the Non-Compliance.

**RESPONSE (REQUIRES SUBMISSION FROM PERMIT HOLDER):** If the Permit Holder has not responded to the Non-Compliance in some way, the presence of an icon in the Response column indicates that the Permit Holder needs to submit a new Non-Compliance Submission.

**OUTCOME:** If a Non-Compliance has been completed, the Outcome will identify how the Non-Compliance was dealt with.

## Searching by Activity Type/Activity ID

When searching for a specific Activity Type, select the Activity Type from the ACTIVITY TYPE menu item, then optionally using the type-ahead feature in the ACTIVITY ID menu item, enter matching values.

The list of matching values is a list of ALL potential values and is not limited to the current search parameters. Once a value is selected from the list of values, select the Apply button to perform the search. The search functionality will take into consideration the selected ACTIVITY ID value when performing the search. If the selected value meets the other search parameters, the search will be successful. However, if the selected value is not within the range of the other search parameters, the search will not be successful and the message 'No Non-Compliances found that match the criteria selected' will be displayed.

The screenshot shows a search interface with two main sections: 'ACTIVITY TYPE' and 'ACTIVITY ID'. In the 'ACTIVITY TYPE' section, a dropdown menu is open with 'Well' selected. Below it, there is a 'SECTION' input field with a placeholder text 'Type a specific Section number e.g. 7(a)'. In the 'ACTIVITY ID' section, there is a text input field containing the number '7'. To the right of this input field, a list of matching Activity IDs is displayed: 28275, 41780, 37015, 41779, and 07392. Each ID in the list has a red circle around the first digit. At the bottom of the interface, there is a status bar showing '(c)(i) Issued' and '100%'.

### Searching by Legislation/Section

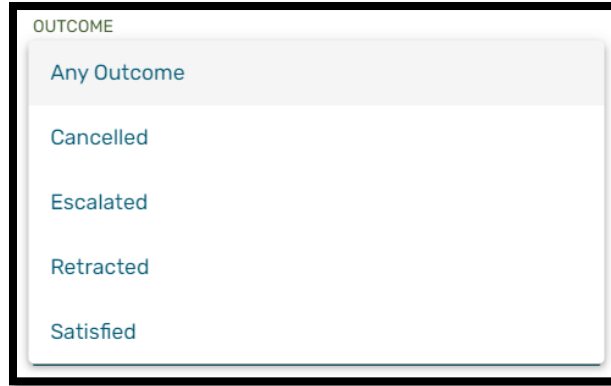
When searching for a specific Legislation (Act or Regulation), select the Act or Regulation from the Legislation menu item, then optionally using the type-ahead feature in the Section menu item, enter matching values.

The list of matching values is a list of ALL potential values and is not limited to the current search parameters. Once a value is selected from the list of values, select the **Apply** button to perform the search. The search functionality will take into consideration the selected SECTION value when performing the search. If the selected value meets the other search parameters, the search will be successful. However, if the selected value is not within the range of the other search parameters, the search will not be successful and the message 'No Non-Compliances found that match the criteria selected' will be displayed.

The screenshot shows a search interface with several filters and a list of results. On the left, there is a 'STATUS' dropdown menu with 'Issued' selected. Below it, there is a 'DUE DATE' section with 'Start' and 'End' input fields and a calendar icon. There is also an 'OVERDUE ONLY' checkbox which is unchecked. Below that is a 'LEGISLATION' dropdown menu with 'Pipeline Crossings Regulation' selected. On the right side, there is a list of matching Legislation items: 2(3)(a)(i), 2(3)(a)(ii), 2(3)(b), 2(3)(b)(i), and 2(3)(b)(ii). Each item has a red circle around the first digit. At the bottom of the list, there is a text input field containing the number '2'.

## Searching by Outcome

The user can select Any Outcome and the search will return all Non-Compliances with an OUTCOME of 'Cancelled', 'Retracted', 'Satisfied' or 'Escalated'. If the user searches by any of the other values, the search will only return Non-Compliances with the selected specific OUTCOME.

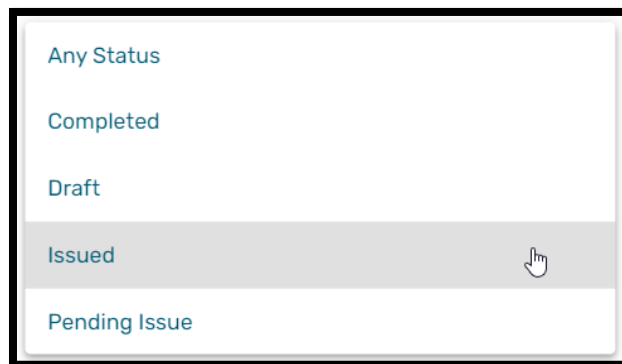


Please note:

1. Please note that the 'Cancelled' OUTCOME is not currently in use; searching 'Cancelled' will not bring back any results.

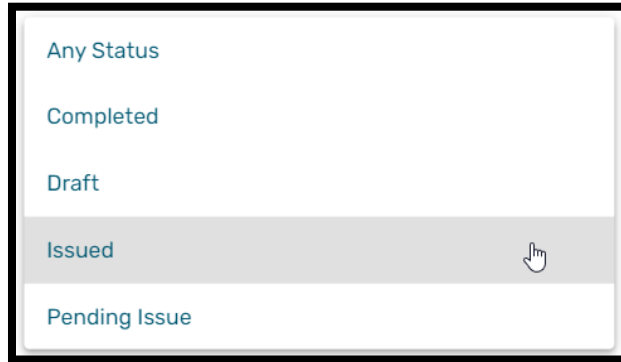
## Searching by Status

The user can select Any Status and the search will return all Non-Compliances with a STATUS of 'Completed', 'Draft', 'Issued', and 'Pending Issue'. If the user searches by any of the other values, the search will only return Non-Compliances with the selected specific STATUS.



Please note:

1. The 'Pending Issue' may only be encountered during periods where there are abnormally slow response times. CM-IS will issue the 'Pending Issue' STATUS temporarily to the Non-Compliance until it is able to complete the processing. After the processing is complete, the Non-Compliance will receive the 'Issued' STATUS.
2. Permit Holders cannot view 'Draft' Non-Compliances and searching by that STATUS will yield 'No Non-Compliances found that match the criteria selected' as the result.

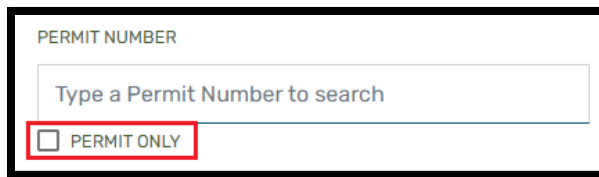


### Toggle (Checkbox) Search

The checkbox search features are a quick way to toggle on and off specific search parameters. There are three toggle searches.

#### Permit Only:

To toggle the search to view only Non-Compliances that are being enforced against a PERMIT, select the  PERMIT ONLY checkbox.



#### Requires Submission from Permit Holder Only:

To toggle the search to view only Non-Compliances that require a Non-Compliance Submission from the Permit Holder, select the  REQUIRES SUBMISSION FROM PERMIT HOLDER ONLY checkbox.



### Overdue Only:

To toggle the search to view only Non-Compliances that are currently overdue, select the  OVERDUE ONLY checkbox.

The screenshot shows a search filter section titled "DUE DATE". It contains two text input fields: "Start" and "End". To the right of the "End" field is a calendar icon. Below these fields is a checkbox labeled "OVERDUE ONLY", which is highlighted with a red rectangular border.

### Cancel, Reset, or Apply

To cancel the current operation, and close the menu, select the  button.

To reset the search parameters to the default settings of displaying only Non-Compliances 'Issued' to the currently selected Permit Holder, select the  button.

To apply the current search parameters, after making selections, select the  button.

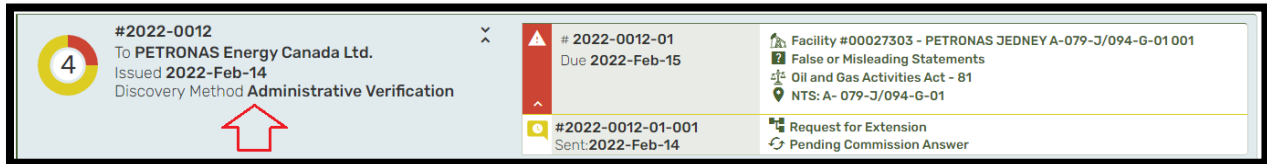


## Chapter 6: Working with the Non-Compliance Notice

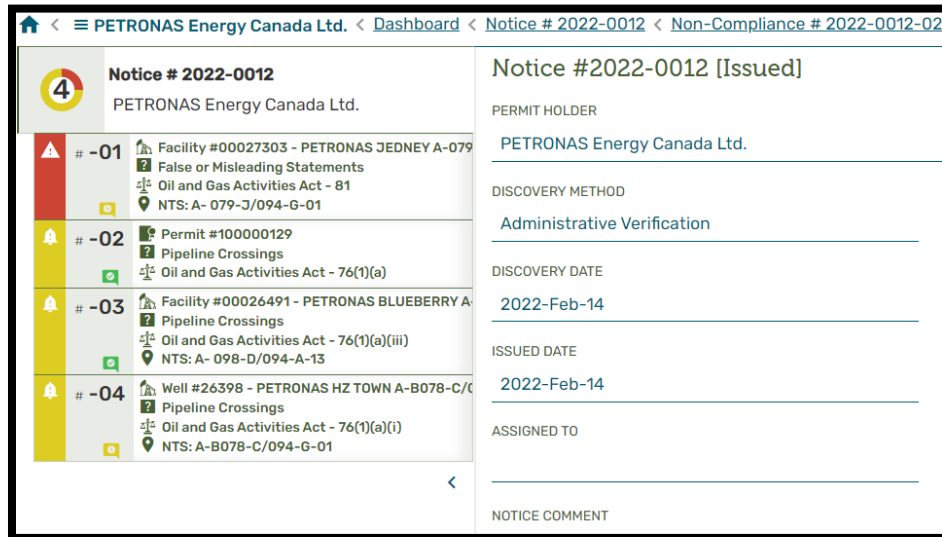
CM-IS manages collections of Non-Compliances by placing them onto Non-Compliance Notices. From the CM-IS Dashboard, users can view a list of all Non-Compliance Notices, and their individual Non-Compliances, that have been issued to a Permit Holder.

### 6.1 Viewing Non-Compliance Notice Details

To view the details of the Non-Compliance Notice, select the Non-Compliance Notice panel from the CM-IS Dashboard.



After clicking on the Non-Compliance Notice panel, the details of the selected Non-Compliance Notice will be displayed.



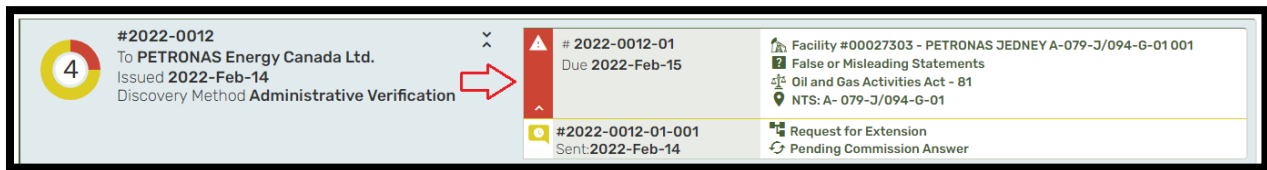
Non-Compliance Notice details include:

- The Non-Compliance Notice Number

- The name of the Permit Holder that the Non-Compliance is issued to
- The date the Non-Compliance Notice was issued to the Permit Holder
- The method by which the Non-Compliance was discovered
- The name of the ASSIGNED TO person at the BCER who issued the Notice
- Comments the BCER have entered
- A list of the individual Non-Compliances included on the Notice

## 6.2 Viewing Non-Compliance Details

To view the details of a Non-Compliance, select the Non-Compliance panel from the CM-IS Dashboard.



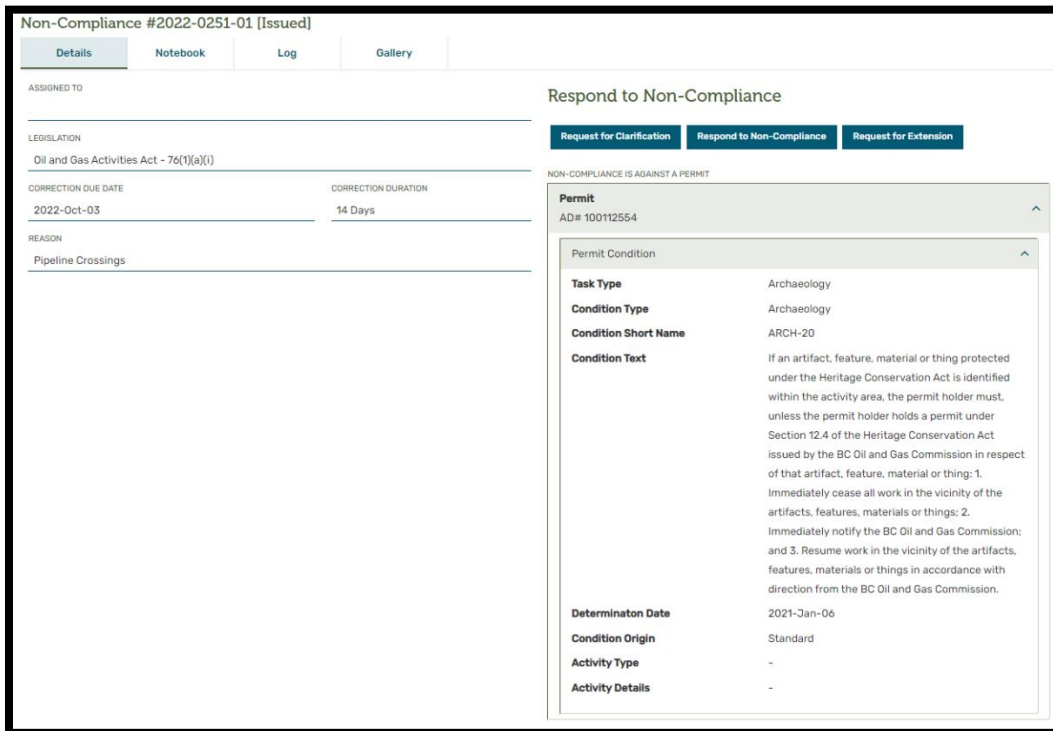
After clicking on the Non-Compliance from the panel, the details of the selected Non-Compliance will be displayed.




Non-Compliance details include:

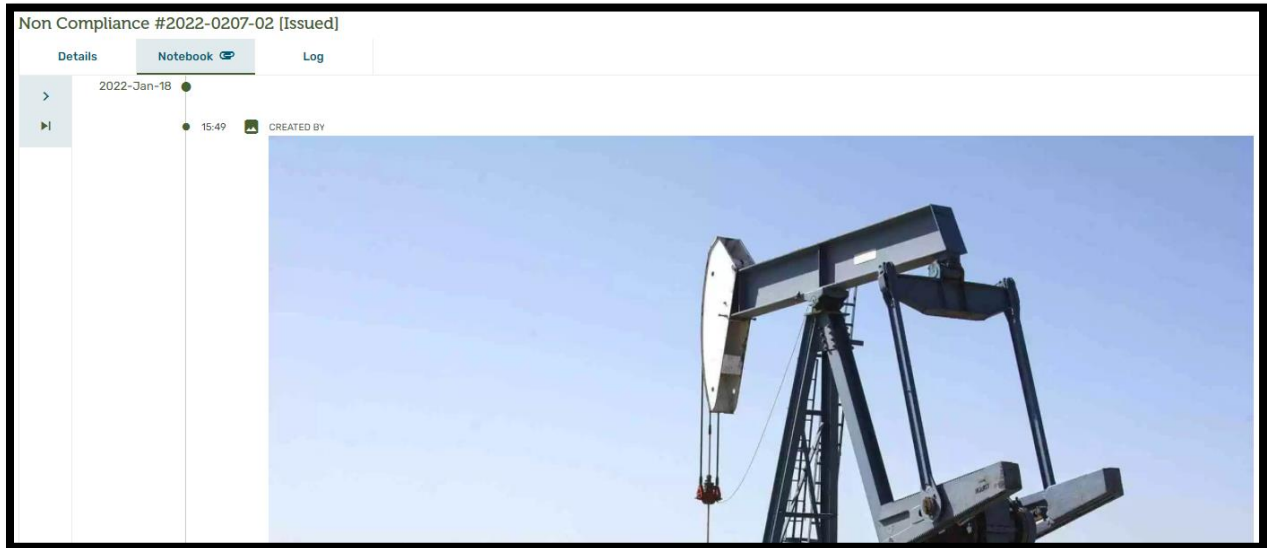
- The Non-Compliance Number

- The name of the ASSIGNED TO person at the BCER who issued the Non-Compliance
- The date that the correction of the Non-Compliance is due
- The number of days before the Non-Compliance must be corrected
- The status of the Non-Compliance
- The legislation being enforced
- The Activity, Permit (and Permit Condition, if applicable), Special Project Order, or Permit Holder that has been identified as being in Non-Compliance
- When an Activity, the Permit Number that the Activity was permitted under
- Any comments that the BCER entered at the time the Non-Compliance was issued



### 6.3 Viewing the Non-Compliance Notebook

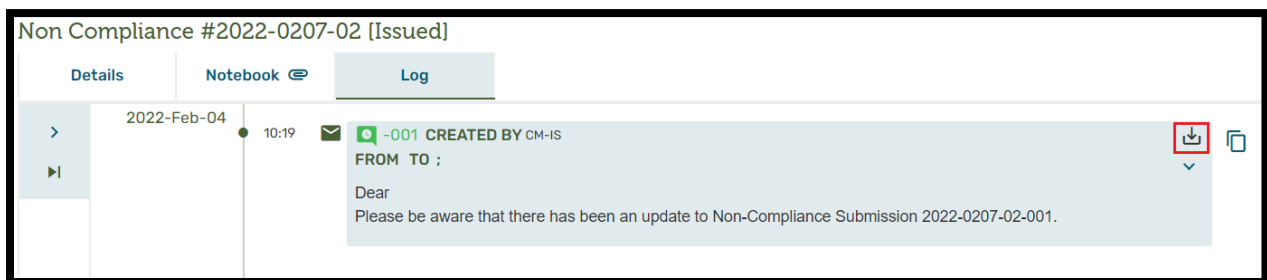
The BCER can provide additional documentation in the form of images, emails, and annotations on a Non-Compliance Notebook to help explain the reason why the Non-Compliance was Issued. There is a  icon displayed on the Notebook tab of the Non-Compliance when additional information is available to view.




## 6.4 Viewing the Non-Compliance Log

The Non-Compliance Log displays a history of all actions and events against the Non-Compliance in chronological order. The items that will show up on the history are:

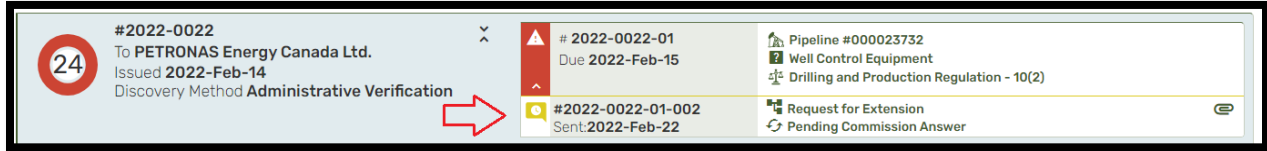
- All CM-IS letters and notification emails about the Non-Compliance Notice or the Non-Compliance sent to the Permit Holder.
- All Notebook entries on the Non-Compliance
- All Status changes of the Non-Compliance
- All BCER Assignment changes to the Non-Compliance



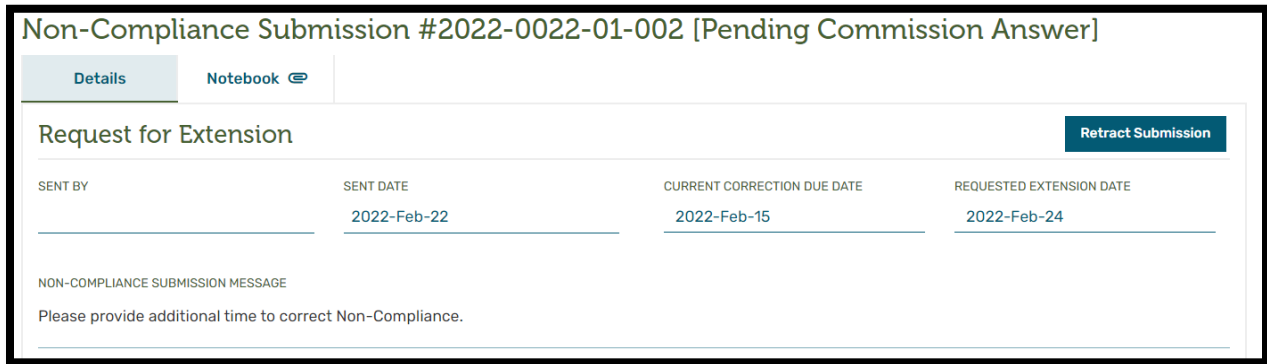
The Permit Holder can download any items with the  symbol.

## 6.5 Viewing Non-Compliance Submission Details

Click within the Non-Compliance Submission panel to see details about the Non-Compliance Submission.



After clicking on the Non-Compliance Submission on the panel, the details of the selected Non-Compliance Submission will be displayed.



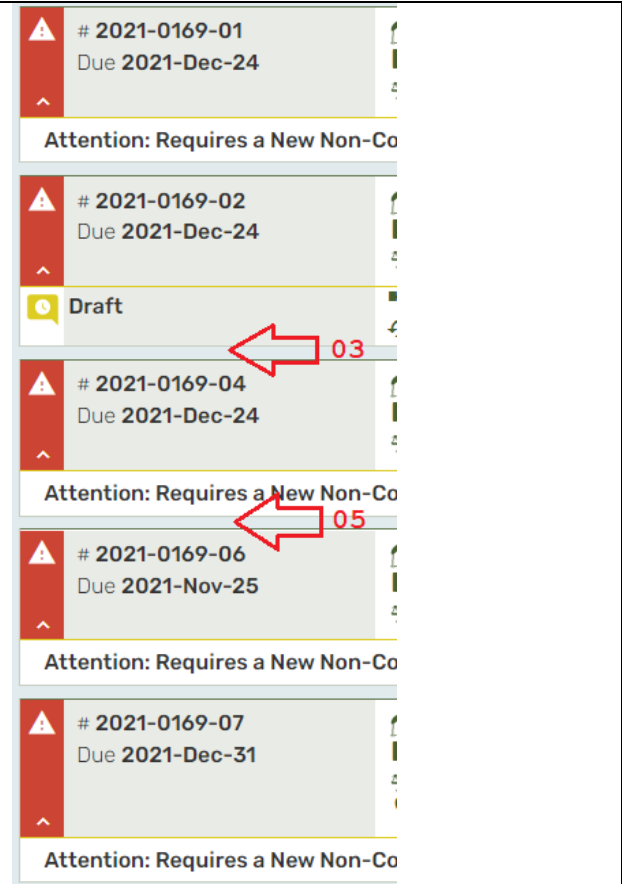
### 6.5.1.1 Viewing the Legislation

Hover over the Act or Regulation text to view the legislation that is being enforced for the Non-Compliance.































The screenshot displays a permit application interface. On the left, a sidebar shows a notification count of 24 and details for permit #2022-0022, issued to PETRONAS Energy Canada Ltd. on 2022-Feb-14, with the subject 'Discovery Method Administrative Verification'. The main area lists several items, each with a status icon (warning or draft), a unique ID, and a due date of 2022-Feb-15. A detailed view for item #2022-0022-01-002 is open, showing its title 'Well Control Equipment' and a reference to 'Drilling and Production Regulation - 10(2)'. The detailed view text reads: '10 (2) At the request of an official, a well permit holder's contractor or rig crew, when it is safe to do so, must test the operation and effectiveness of the blowout prevention equipment installed on the permit holder's well in accordance with the Well Control Procedure placard issued by the Canadian Association of Oilwell Drilling Contractors or well control procedures approved by an accepted safety training organization.' A warning message at the bottom states: 'Attention: Requires a New Non-Compliance Submission from the Permit Holder'.

## 6.6 Viewing a 'Completed' Non-Compliance

Once a Non-Compliance has been 'Completed', regardless of the OUTCOME of the Non-Compliance (including if the Non-Compliance was escalated for enforcement), the Non-Compliance will 'fall-off' the dashboard and will no longer be displayed.

<p>'Completed' Non-Compliances do not display on the dashboard as there is no need to perform any actions on these items. Consequently, there will be gaps in the numbering sequence where these Non-Compliances would reside.</p>	 <p># 2021-0169-01 Due 2021-Dec-24</p> <p>Attention: Requires a New Non-Co</p> <p># 2021-0169-02 Due 2021-Dec-24</p> <p>Draft</p> <p># 2021-0169-04 Due 2021-Dec-24</p> <p>Attention: Requires a New Non-Co</p> <p># 2021-0169-06 Due 2021-Nov-25</p> <p>Attention: Requires a New Non-Co</p> <p># 2021-0169-07 Due 2021-Dec-31</p> <p>Attention: Requires a New Non-Co</p>
--	--

However, the 'Completed' Non-Compliances are still visible, when viewing the Non-Compliance Notice.

	# -01	 Pipeline #00006644  Water Quality  Environmental Protect
	# -02	 STWU #0005260  Applications  Oil and Gas Road Regu
	# -03	 Road #02683  Well Control Equipmen  Drilling and Productio
	# -04	 Order #98-16-003 / A  Permit Required  Oil and Gas Activities /
	# -05	 Facility #00026229 -  Submissions before Cr  Liquefied Natural Gas  DLS: 02-11-080-16
	# -06	 CIAS #0002083  Aquifers  Environmental Protec
	# -07	 Well #26474 - TOURMA  Venting and Fugitive E  Drilling and Productio  A08-15-080-18



## 6.7 Viewing an ‘Inspection’ Non-Compliance

For a Non-Compliance Notice with Discovery Method of ‘Inspection’, the user is presented with additional navigation tabs that allow one to navigate to the Completed Inspection Details, Inventory, Notebook, and Gallery. Please see [Chapter 8: Viewing a Completed Inspection](#).

Inspection #2022-0112: PETRONAS Energy Canada Ltd. [Completed - Non-Compliance(s) Found]

Details	Inventory	Notebook	Gallery	Non-Compliance
<p><b>2</b> Notice # 2022-0167 PETRONAS Energy Canada Ltd.</p> <p><b>-01</b> Well #00620 - PETRONAS ET AL W BEG A- 079-F/094-G-01 Order Conditions Oil and Gas Activities Act - 21(a)(ii) NTS: A- 079-F/094-G-01</p> <p><b>-02</b> Facility #00018430 - PETRONAS BEGWEST A-079-F/094-G-01001 Permit Conditions Oil and Gas Activities Act - 21(b)(ii) NTS: A- 079-F/094-G-01</p>		<p>Notice #2022-0167 [Issued]</p> <p>PERMIT HOLDER PETRONAS Energy Canada Ltd.</p> <hr/> <p>DISCOVERY METHOD Inspection</p> <hr/> <p>DISCOVERY DATE 2022-Aug-03</p> <hr/> <p>ISSUED DATE 2022-Aug-03</p> <hr/> <p>ASSIGNED TO Darin Leong</p> <hr/> <p>NOTICE COMMENT None</p>		

## Chapter 7: Non-Compliance Submissions: Communicating with the BCER

Non-Compliance Submissions provide a process whereby a Permit Holder representative can ask questions, request an extension, or respond to a Non-Compliance.

### 7.1 Creating a Non-Compliance Submission

There are three types of Non-Compliance Submissions available to Permit Holder representatives, which facilitate communicating with the BCER regarding individual Non-Compliances.

**Request for Clarification**

Use the **Request for Clarification** button to ask questions of the BCER regarding the content of the Non-Compliance

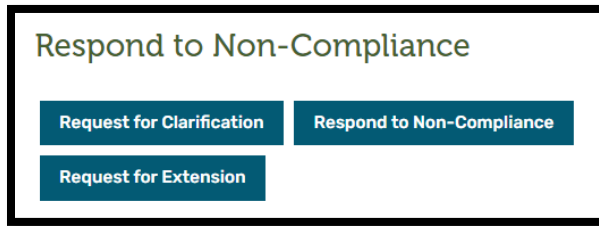
**Respond to Non-Compliance**

Use the **Respond to Non-Compliance** button to resolve the Non-Compliance.

**Request for Extension**

Use the **Request for Extension** button to ask the BCER for additional time to address the Non-Compliance.


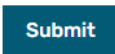
Access the Non-Compliance Submission options by clicking on the Non-Compliance, from the Non-Compliance Notices dashboard, or from the Non-Compliance from within the Non-Compliance Notice screen.



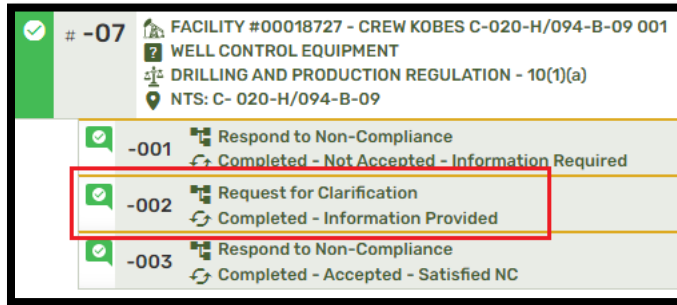
### 7.1.1 Request for Clarification

Add information to support the 'Request for Clarification' into the NON-COMPLIANCE SUBMISSION MESSAGE field.



Save the contents of the message by selecting the  icon, then select the  button.

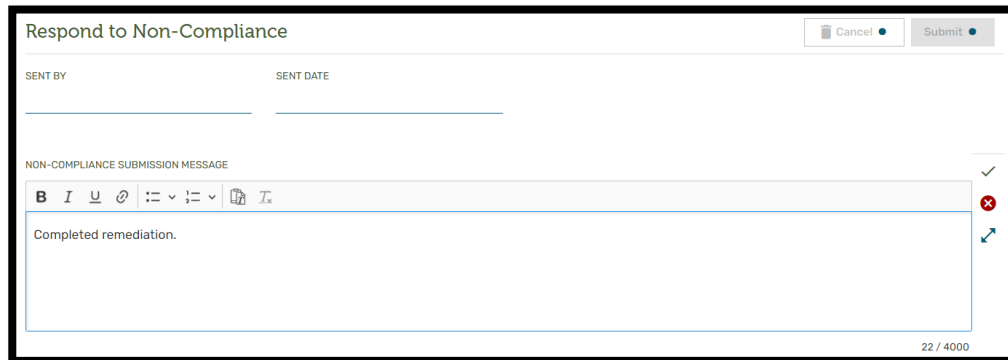
Once the BCER receives the 'Request for Clarification', they will provide 'Provide Information' in the way of a NON-COMPLIANCE SUBMISSION ANSWER. Once the BCER has sent the answer back to the Permit Holder, the Non-Compliance Submission will appear as follows:



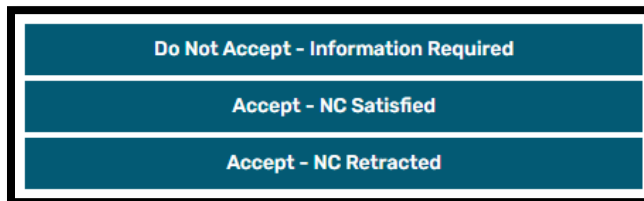
Click on the Submission to read the answer that the BCER has provided.

### 7.1.2 Respond to Non-Compliance

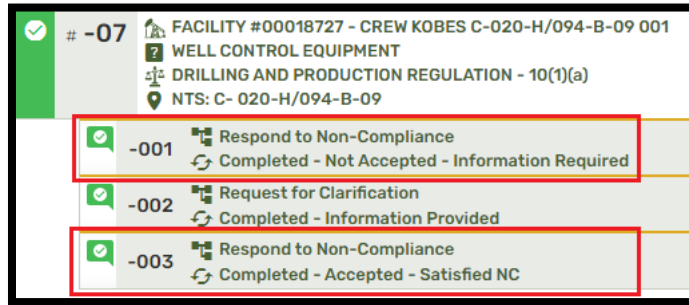
Add information to support the 'Respond to Non-Compliance' into the NON-COMPLIANCE SUBMISSION MESSAGE field.



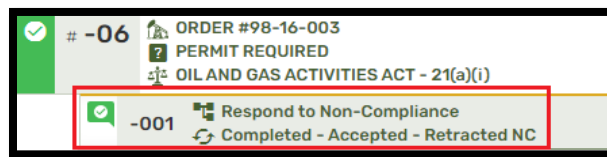
Once the BCER receives the 'Respond to Non-Compliance', they will provide a NON-COMPLIANCE SUBMISSION ANSWER, along with one of the following responses:



Once the BCER has replied to the Permit Holder, using one of the above responses, the Non-Compliance Submission will appear as follows:




Optionally, the BCER may also decide that the Non-Compliance is no longer required and therefore may 'retract' the Non-Compliance. If the BCER 'retracts' a Non-Compliance, the Non-Compliance Submission will appear as follows:

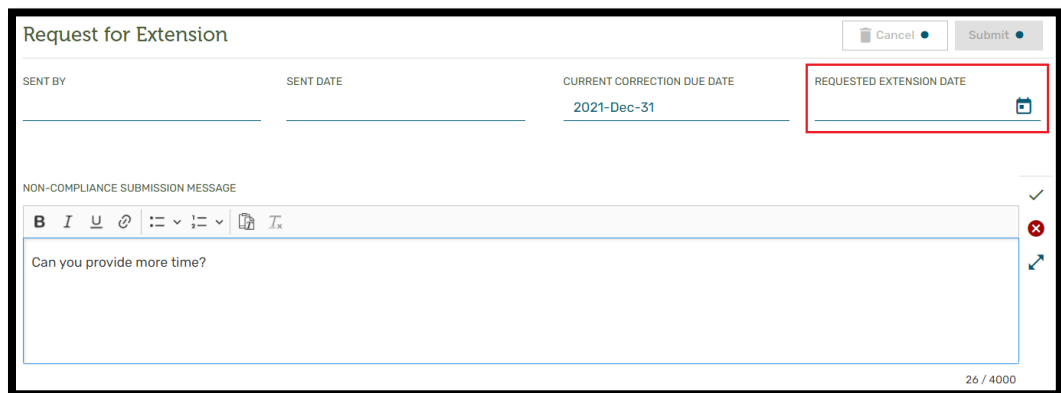


Click on the Non-Compliance Submission to read the answer that the BCER has provided.

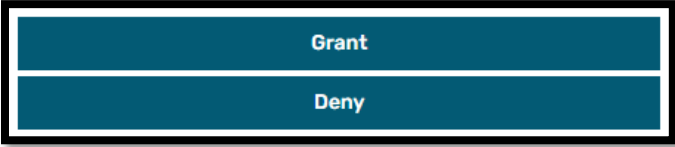
### 7.1.3 Request for Extension

Add information to support the 'Request for Extension' into the NON-COMPLIANCE SUBMISSION MESSAGE field.

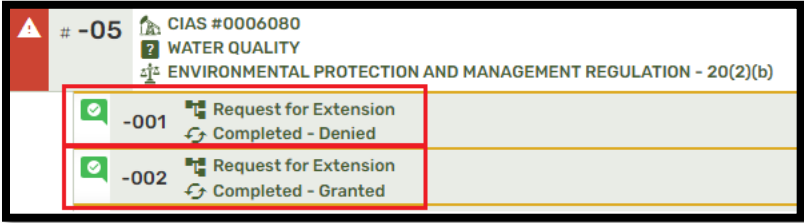
Click on the  icon to select a date for the REQUESTED EXTENSION DATE.



Once the BCER receives the 'Request for Extension', they will provide a NON-COMPLIANCE SUBMISSION ANSWER, along with one of the following responses:



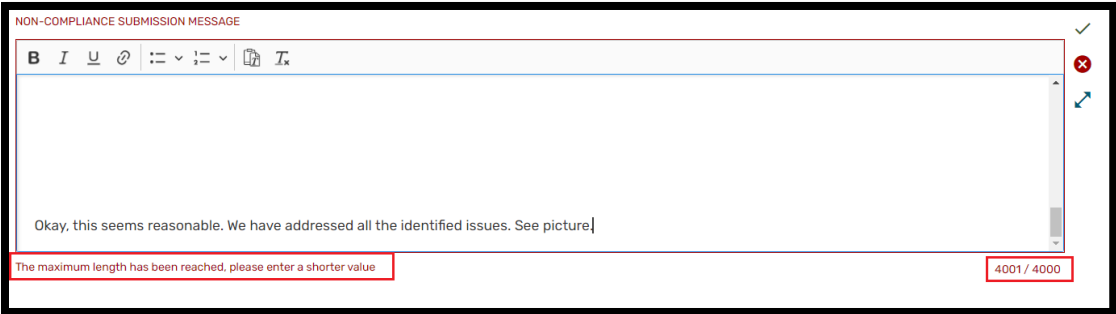
Once the BCER has replied to the Permit Holder, using one of the above responses, the Non-Compliance Submission will appear as follows:



Click on the Non-Compliance Submission to read the answer that the BCER has provided.

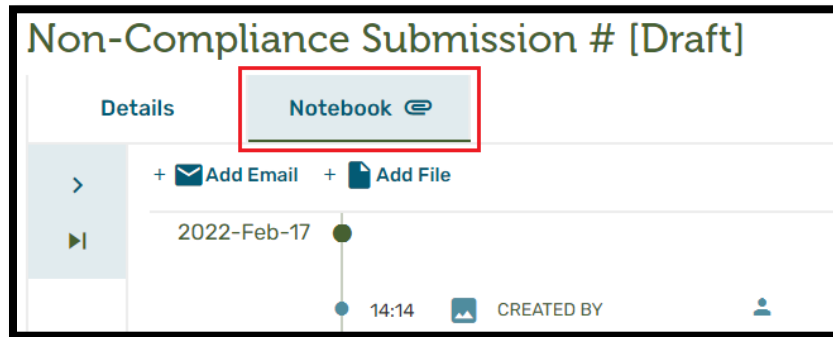
### 7.1.4 Non-Compliance Submission Message Field



The maximum number of characters that can be entered into the NON-COMPLIANCE SUBMISSION MESSAGE field is 4000. If exceeded, the character counter will turn red, and the error message 'The maximum length has been reached, please enter a shorter value' will be displayed.





## 7.1.5 Managing Attachments on a Non-Compliance Submission Notebook



Files and emails can be added to the Non-Compliance Submission Notebook to support the Submission while it is in Draft Status.



From the Notebook tab on any Draft Non-Compliance Submission, select  **Add File** button or  **Add Email** button to add any of the types of files listed below:

	
<p>The following file types can be attached to a Non-Compliance Submission:</p> <ul style="list-style-type: none"> <li>• Microsoft Word Documents .doc, .docx</li> <li>• Microsoft Excel Documents .xls, .xlsx, .csv, .xlsm</li> <li>• Microsoft Power Point Documents .ppt, .pptx</li> <li>• Text Documents .txt, .rtf, .csv</li> </ul>	<p>The following file types can be attached to a Non-Compliance Submission:</p> <ul style="list-style-type: none"> <li>• .msg</li> <li>• .eml</li> </ul>

<ul style="list-style-type: none"> <li>• Video Documents .avi, .mov, .m4v, .svi, .wmv, .mp4, .mpg, .mpeg, .mkv</li> <li>• Picture Documents .gif, .bmp, .jpg, .jpeg, .png, .svg, .tif</li> <li>• Portable Document Files .pdf</li> <li>• Archive Files .zip</li> </ul>	
--	--

After selecting  **Add File** or  **Add Email** button, files can be attached to the Non-Compliance Submission using one of the following methods:

- Drag & Drop
- Browse

**Please Note:**

The maximum file size that can be uploaded to the application is 450 Mb. However, depending on network, or internet conditions, the ability to upload a file of this size may be compromised. Errors or warnings may occur if the file size exceeds these limits.

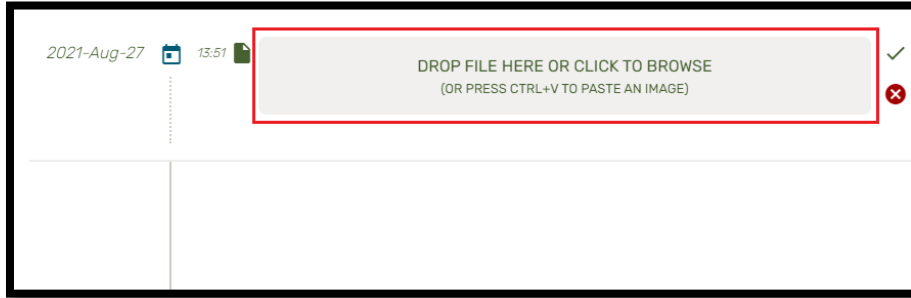
### 7.1.5.1 Adding a File



**Drag & Drop Method**

To use the drag & drop method for attaching a file to a Non-Compliance Submission, open Window Explorer and navigate to the location of the file that will be attached to the Non-Compliance Submission.

Select the required file and drag, then drop in the area marked as ‘DROP FILE HERE OR CLICK TO BROWSE’







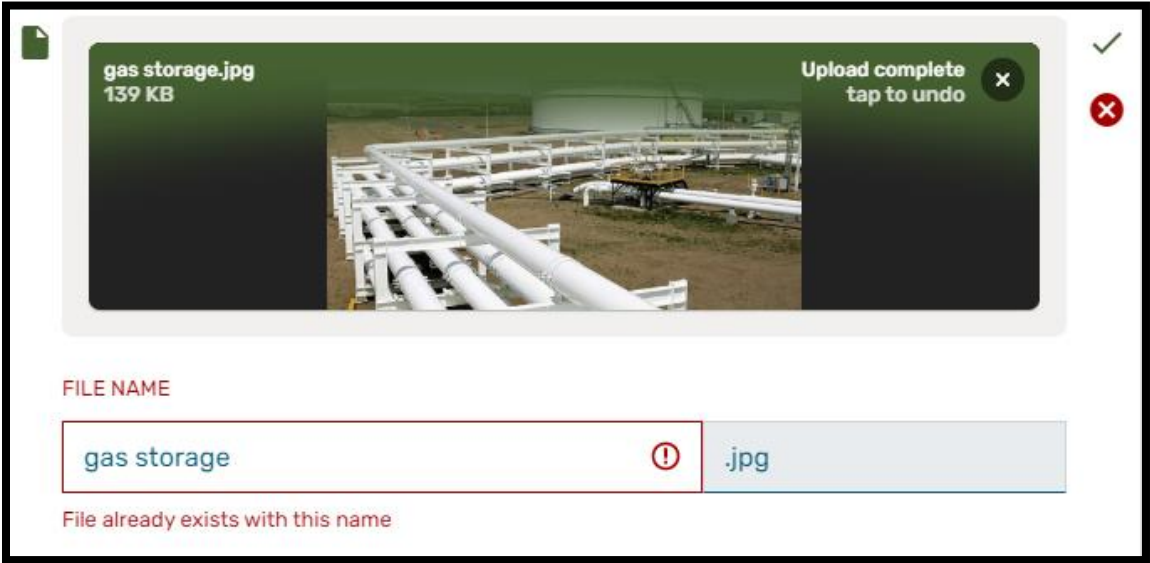
When the 'Upload Complete' message is displayed, select the  icon to save, optionally change the name of the file, or select the  icon to cancel.



If required, change the name of the file.

Once a file has been added it is possible to further annotate the file by selecting   **Add Annotation** button. See Annotating Files.

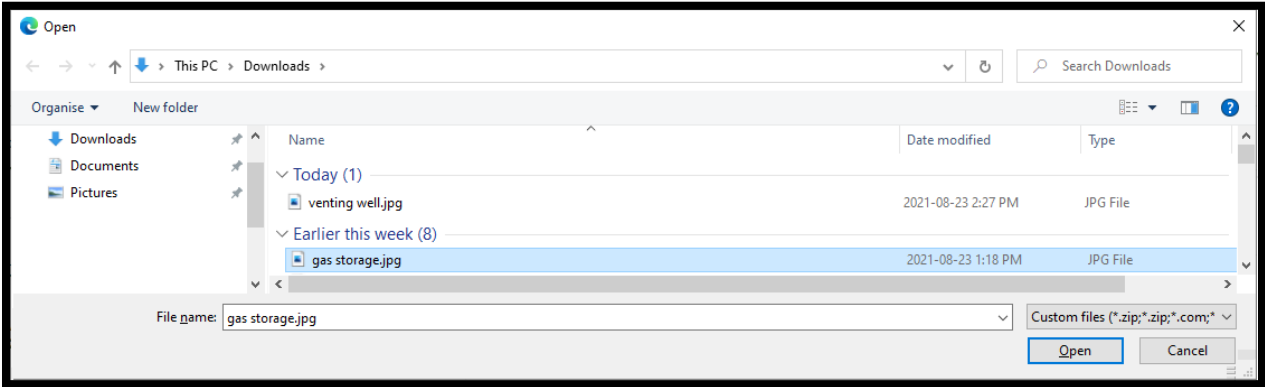
If a file already exists with the same file name, the system will provide the following warning 'File already exists with this name'





**Browse Method**

To use the browse method for attaching a file to a Non-Compliance Submission, click on the file landing spot (DROP FILE HERE OR CLICK TO BROWSE), Windows Explorer window will open.

With Windows Explorer open, select the required file, and click open to begin the process.



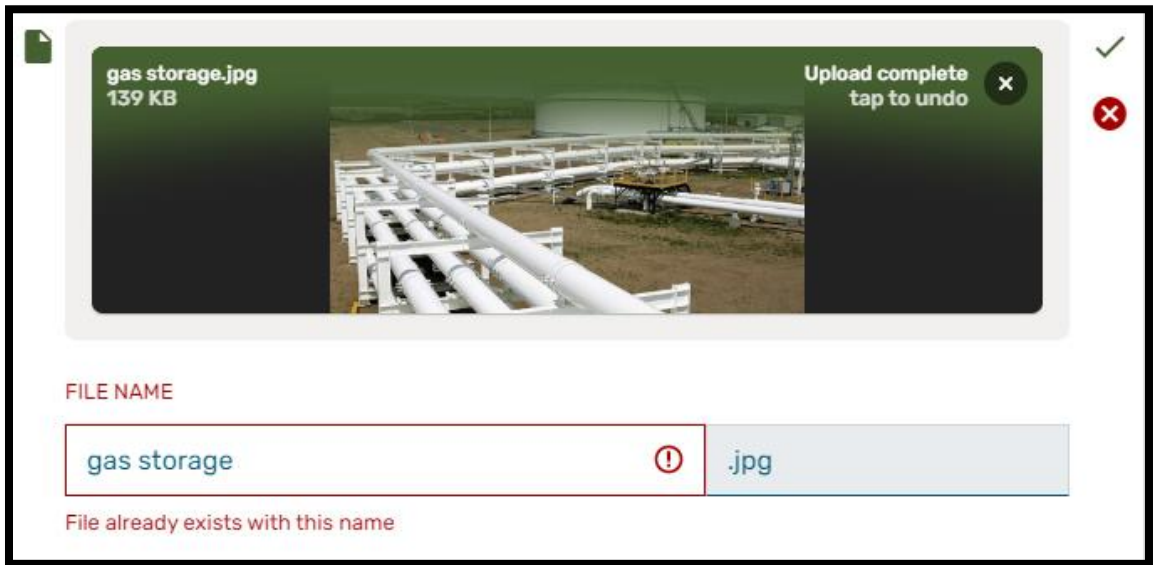
When the 'Upload Complete' message is displayed, select the  icon to save, optionally change the name of the file, or select the  icon to cancel.



If required, change the name of the file.

Once a file has been added it is possible to further annotate the file by selecting + **Add Annotation** button. See Annotating Files.



If a file already exists with the same file name, the system will provide the following warning 'File already exists with this name'

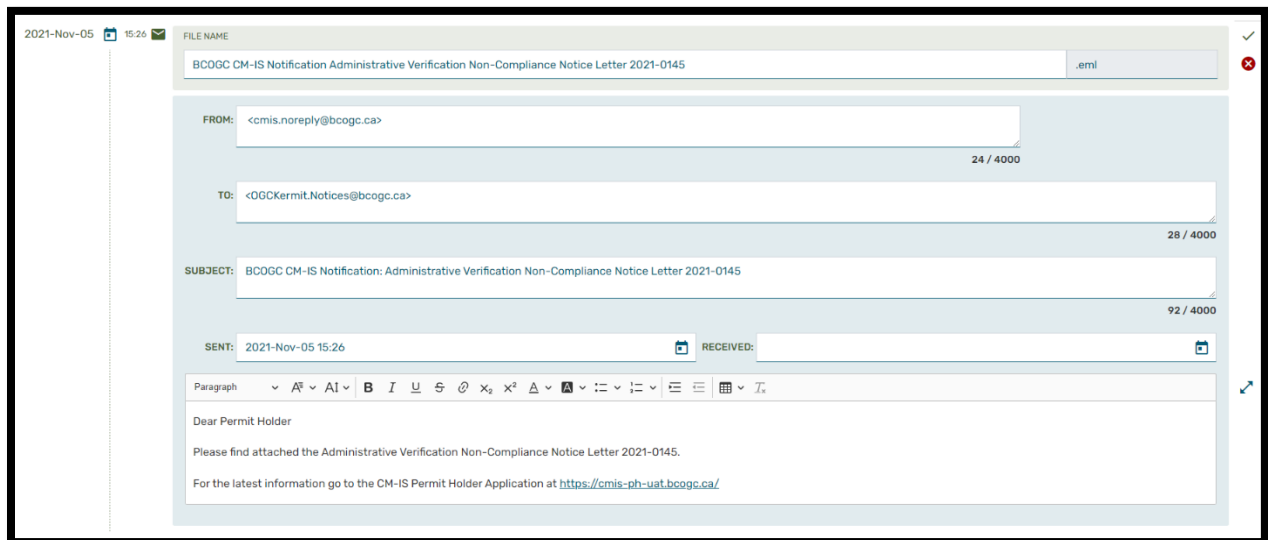


## 7.1.5.2 Adding an Email



After using either the Drag & Drop, or the Windows Explorer method of adding an Email to the Non-Compliance Submission Notebook, it is possible to modify the email information taken directly from the email file, including the following:

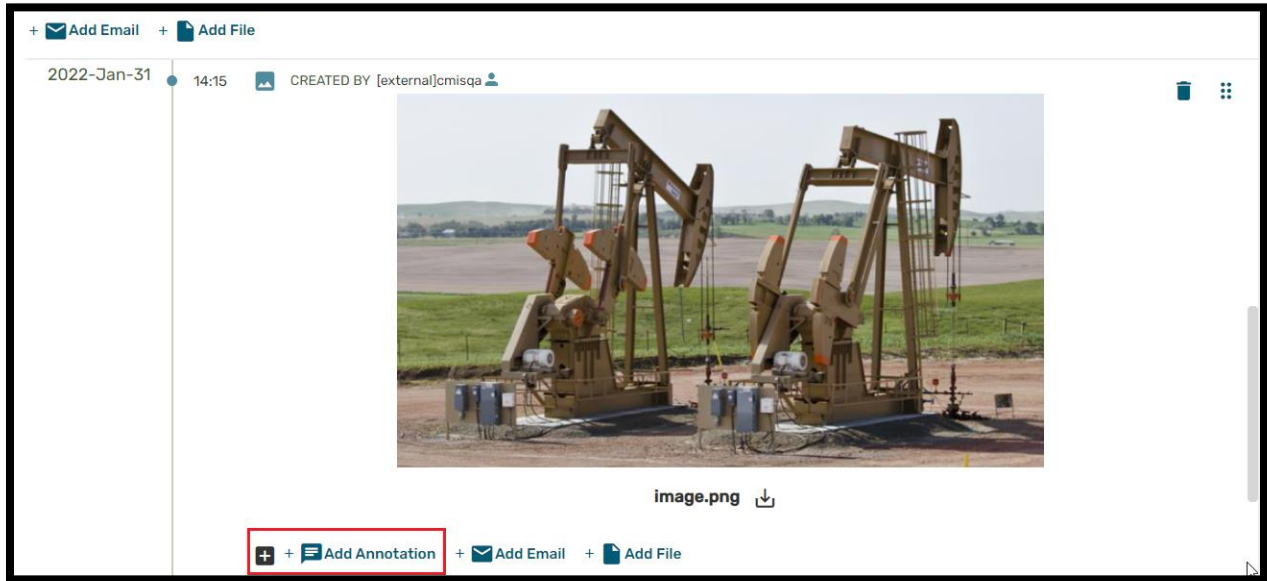
- File Name
- From
- To
- Subject
- Sent
- Received
- Body of the email

Select the  icon to save, optionally change the email information, or select the  icon to cancel.



### 7.1.5.3 Annotating Files and Emails



When adding either a file, or an email to a Non-Compliance Submission, the file or email can be further described by adding annotation. Hover over the  icon, then select  **Add Annotation**






The content of the annotation can be up to 4000 characters in length, and can include rich-text formatting such as:

- Bolding
- Italics
- Underling
- Bullets
- Numbering


Click the  icon to save the annotation, or the  to cancel.

### 7.1.5.4 Downloading a File or an Email

All files and emails that have been attached to a Non-Compliance, either directly, or on a Non-Compliance Submission can be downloaded.


Clicking the  icon, will start the associated file to be downloaded.

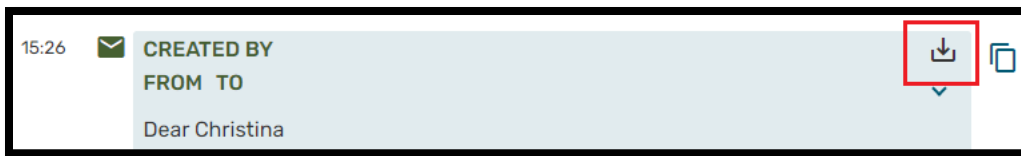
## File

Select the download icon  located beside the name of the file.



## Email


Select the download icon  located at the top right corner of the email.

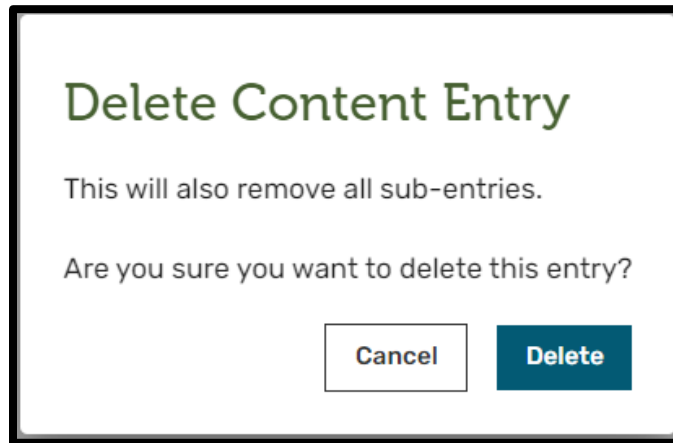


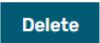

## 7.1.5.5 Deleting a File or Email

Files and emails that have been attached to a Non-Compliance Submission while in Draft Status can be deleted before the Non-Compliance Submission is sent.




Select the trashcan icon  located at the top right corner of the Non-Compliance Submission Notebook entry.



Select Remove button  to delete the image from the Non-Compliance Submission Notebook or Cancel button  to remove it from the Non-Compliance Submission Notebook.

### 7.1.5.6 Moving a Non-Compliance Submission Notebook Entry

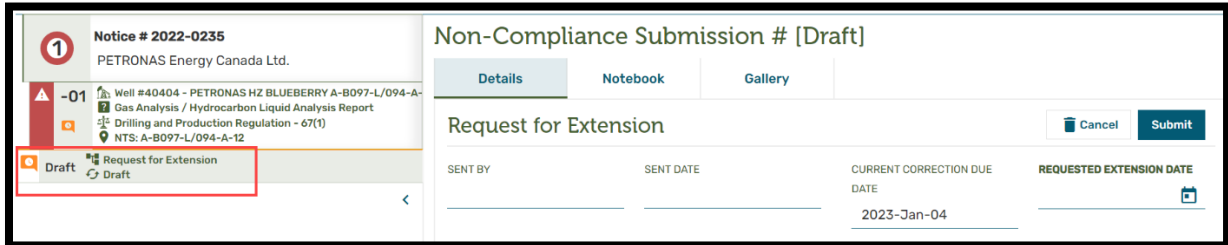
Entries in the Non-Compliance Submission Notebook can be reordered by selecting the  icon located at the top right corner of the Non-Compliance Submission Notebook entry with the mouse and dragging it to the desired location.





## 7.2 Submitting a Non-Compliance Submission

Once the required information for the Non-Compliance Submission is provided, submit the request to the BCER.



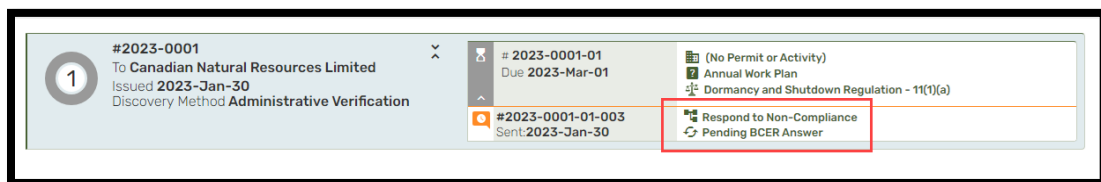
### Please Note:

While a Non-Compliance Submission has a STATUS of 'Draft', the BCER may 'Retract' the Non-Compliance. If this occurs, any Non-Compliance Submissions that have a status of 'Draft' will be removed from the Non-Compliance, removing any attachments and annotations, along with the Non-Compliance Submission.

The Non-Compliance Submission will now have a Status of 'Pending BCER Answer', waiting for an answer from the BCER.



Returning to the dashboard, the Non-Compliance Submission will appear in the Non-Compliance Submission panel of the Non-Compliance.



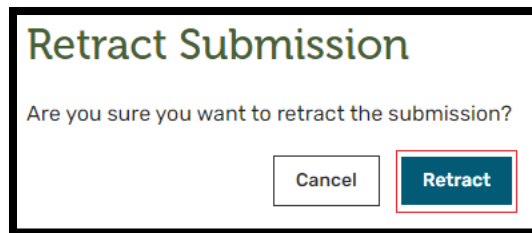
## 7.3 Retract a Non-Compliance Submission

At any time after a Non-Compliance Submission has been made to BCER, but prior to the BCER response, the Non-Compliance Submission can be retracted.

To retract a Non-Compliance Submission, navigate to the Non-Compliance Submission, and

select the  button.

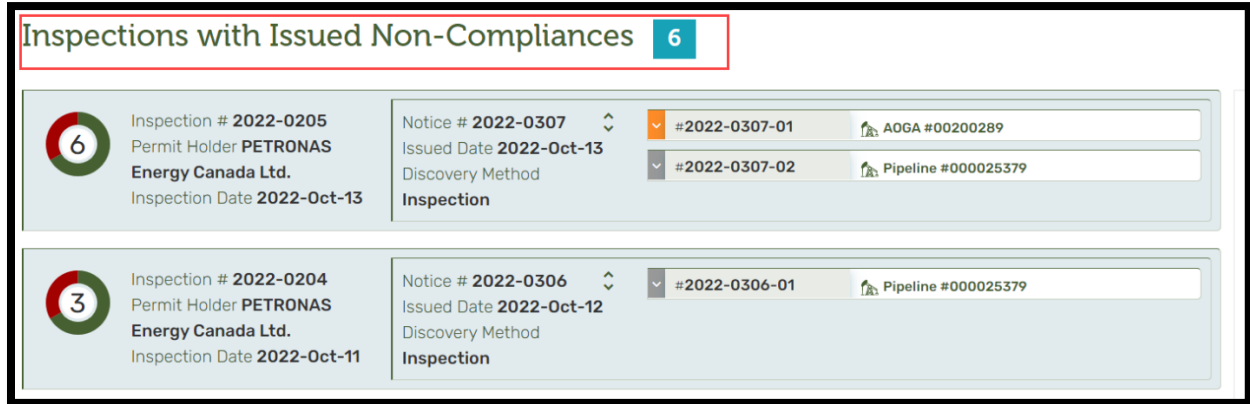
Complete the retraction when prompted or cancel.



Once confirmed, the Non-Compliance Submission will be identified as 'Completed – Retracted'. Any information associated with the Non-Compliance Submission will still be viewable, but not changeable. The BCER will also be able to view the information associated with the Non-Compliance Submission.

## Chapter 8: Using the Inspections Dashboard

The Inspections Dashboard allows the Permit Holder to view all their Inspections in Completed Status that have a Non-Compliance Notice in Issued Status for their organization.








The user is provided a summary count of all their Inspections with Non-Compliances at the top of the dashboard. In the above illustration, the user is informed that they have 6 Inspections with issued Non-Compliances.


Users are also able to search for a specific Inspection and export a CSV file containing all Permit Holder’s Non-Compliances (see Chapter 11 for exporting Inspections and any associated Non-Compliances).












### 8.1 Expand/Collapse Inspection Non-Compliances

To display the Issued Non-Compliances for an Inspection, click on the  to expand and expose the details.

**Inspections with Issued Non-Compliances** 6

 Inspection # <b>2022-0205</b> Permit Holder <b>PETRONAS Energy Canada Ltd.</b> Inspection Date <b>2022-Oct-13</b>	Notice # <b>2022-0307</b> Issued Date <b>2022-Oct-13</b> Discovery Method <b>Inspection</b>	#2022-0307-01  AOGA #00200289
		#2022-0307-02  Pipeline #000025379
 Inspection # <b>2022-0204</b> Permit Holder <b>PETRONAS Energy Canada Ltd.</b> Inspection Date <b>2022-Oct-11</b>	Notice # <b>2022-0306</b> Issued Date <b>2022-Oct-12</b> Discovery Method <b>Inspection</b>	#2022-0306-01  Pipeline #000025379

Click on the  to collapse the details and revert back to only displaying the summary view for all the Issued Non-Compliances associated to the Inspection.


 Inspection # <b>2022-0205</b> Permit Holder <b>PETRONAS Energy Canada Ltd.</b> Inspection Date <b>2022-Oct-13</b>	Notice # <b>2022-0307</b> Issued Date <b>2022-Oct-13</b> Discovery Method <b>Inspection</b>	 #2022-0307-01 Due 2022-Oct-14 Assigned To Charles Webster	 AOGA #00200289  Permit Required  Oil and Gas Activities Act - 21(a)(i)
		 #2022-0307-02 Due 2022-Oct-27 Assigned To Charles Webster	 Pipeline #000025379  Pipeline Crossings  Oil and Gas Activities Act - 76(1)(a)(i)
 Inspection # <b>2022-0204</b> Permit Holder <b>PETRONAS Energy Canada Ltd.</b> Inspection Date <b>2022-Oct-11</b>	Notice # <b>2022-0306</b> Issued Date <b>2022-Oct-12</b> Discovery Method <b>Inspection</b>	#2022-0306-01  Pipeline #000025379	

## 8.2 Dashboard Sort Order

Inspections with Issued Non-Compliances are displayed from the oldest to the newest based on the Inspection #.

### 8.3 The Rondel

[Home](#) < [PETRONAS Energy Canada Ltd.](#) < [Dashboard](#)  
**Issued Non-Compliances** 8

 <p>                     Inspection # <b>2022-0088</b>                      Permit Holder <b>PETRONAS Energy Canada Ltd.</b>                      Inspection Date <b>2022-Jun-23</b> </p> <p style="color: red; font-weight: bold;">Rondel</p>	<p>                     Non-Compliance Notice # <b>2022-0116</b>                      Issued Date <b>2022-Jul-08</b>                      Discovery Method <b>Inspection</b> </p>	<p> <span style="color: red; font-weight: bold;">▲</span> #2022-0116-01                      Due <b>2022-Jul-09</b>                      Assigned To <b>Charles Webster</b> </p>	<p> <span style="color: green;">▲</span> Road #00320  <span style="color: green;">■</span> Emergency Shutdown Devices  <span style="color: green;">■</span> Drilling and Production Regulation - 49(1)(a)                 </p>
<p> <span style="color: red; font-weight: bold;">▲</span> #2022-0116-02                      Due <b>2022-Jul-09</b>                      Assigned To <b>Charles Webster</b> </p>		<p> <span style="color: green;">▲</span> GEO #2002-142  <span style="color: green;">■</span> Emergency Shutdown Devices  <span style="color: green;">■</span> Drilling and Production Regulation - 49(1)(c)                 </p>	




There is a colour coded rondel located on the left-hand side of each Inspection. The red section of the rondel denotes the proportion of Inspected Inventory Items with one or more Non-Compliances, while the green section is the proportion of Inspected Inventory Items that are now In Compliance (the Non-Compliances were resolved). The number in the middle of the rondel is the total number of Inspected Inventory Items for the Inspection.

### 8.4 Inspection Details and Non-Compliance Navigation

If a user clicks on the Inspection Panel,

[Home](#) < [PETRONAS Energy Canada Ltd.](#) < [Dashboard](#)  
**Issued Non-Compliances** 8

 <p>                     Inspection # <b>2022-0088</b>                      Permit Holder <b>PETRONAS Energy Canada Ltd.</b>                      Inspection Date <b>2022-Jun-23</b> </p> <p style="color: red; font-weight: bold;">This is the Inspection Panel</p> <p style="text-align: center;">☞</p>	<p>                     Non-Compliance Notice # <b>2022-0116</b>                      Issued Date <b>2022-Jul-08</b>                      Discovery Method <b>Inspection</b> </p>	<p> <span style="color: red; font-weight: bold;">▲</span> #2022-0116-01                      Due <b>2022-Jul-09</b>                      Assigned To <b>Charles Webster</b> </p>	<p> <span style="color: green;">▲</span> Road #00320  <span style="color: green;">■</span> Emergency Shutdown Devices  <span style="color: green;">■</span> Drilling and Production Regulation - 49(1)(a)                 </p>
<p> <span style="color: red; font-weight: bold;">▲</span> #2022-0116-02                      Due <b>2022-Jul-09</b>                      Assigned To <b>Charles Webster</b> </p>		<p> <span style="color: green;">▲</span> GEO #2002-142  <span style="color: green;">■</span> Emergency Shutdown Devices  <span style="color: green;">■</span> Drilling and Production Regulation - 49(1)(c)                 </p>	

The user will be taken to the Inspection Details for the Inspection.

[Home](#) < [PETRONAS Energy Canada Ltd.](#) < [Dashboard](#) < Inspection 2022-0088

Inspection #2022-0088: PETRONAS Energy Canada Ltd. [Completed - Non-Compliance(s) Found]

Details	Notebook	Gallery	Non-Compliance
---------	----------	---------	----------------

INSPECTION DATE	ASSIGNED TO
2022-Jun-23	Charles Webster

INSPECTION COMMENT

The user can select the Non-Compliance tab on the Inspection to view the details of the Non-Compliances associated with the Inspection and respond to any Non-Compliance through a Non-Compliance Submission. Refer to **Chapter 7: Non-Compliance Submissions: Communicating with the BCER** for more information on managing Non-Compliance Submissions.

[Home](#) < [PETRONAS Energy Canada Ltd.](#) < [Dashboard](#) < Notice # 2022-0299

Inspection #2022-0190: PETRONAS Energy Canada Ltd. [Completed - Non-Compliance(s) Found]

Details	Notebook	Gallery	Non-Compliance
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1

**Notice # 2022-0299**

PETRONAS Energy Canada Ltd.

-01

Pipeline #000025379

Pipeline Crossings

Oil and Gas Activities Act - 76(1)(a)(iii)

Notice #2022-0299 [Issued]

PERMIT HOLDER  
 PETRONAS Energy Canada Ltd.

DISCOVERY METHOD  
 Inspection

DISCOVERY DATE  
 2022-Oct-07

ISSUED DATE  
 2022-Oct-07

ASSIGNED TO

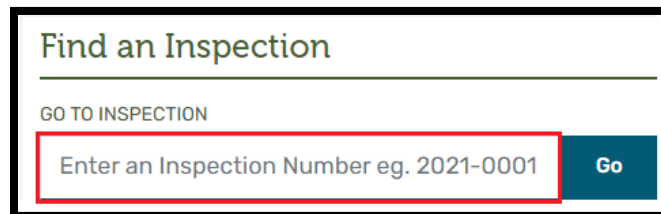
NOTICE COMMENT  
 None

## Chapter 9: Searching for an Inspection

### 9.1 Searching for an Inspection

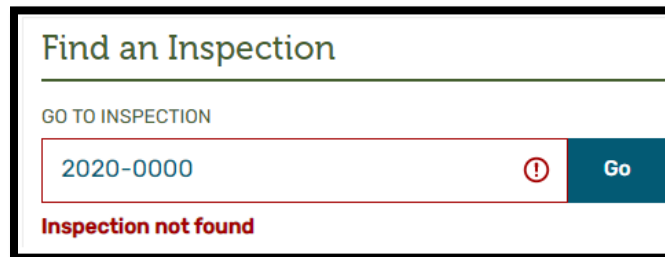
To find a specific Inspection, enter the corresponding number into the GO TO INSPECTION field under the 'Find an Inspection' banner.

- To find an Inspection, enter its number, for example 2022-0092



The screenshot shows a form titled "Find an Inspection". Below the title is a horizontal line. Underneath, the text "GO TO INSPECTION" is displayed. A text input field contains the placeholder text "Enter an Inspection Number eg. 2021-0001". To the right of the input field is a blue button labeled "Go".

If the number cannot be found, an error message will appear:



The screenshot shows the same "Find an Inspection" form. The text input field now contains the number "2020-0000". To the right of the input field is a red warning icon (an exclamation mark inside a circle). Below the input field, the text "Inspection not found" is displayed in red. The blue "Go" button remains to the right.

### 9.2 Using the Advanced Search Inspections Screen

For more search options, click on 'Search Inspections'.

### Find an Inspection


---


GO TO INSPECTION

Go

Search

[Search Inspections](#)

Inspections with ongoing, not-yet-resolved Non-Compliances are indicated with the  icon.

INSPECTION # ▼	INSPECTION DATE ▼	ASSIGNED TO ▼	OUTCOME ▼	NON-COMPLIANCES ▼
<a href="#">2022-0210</a>	2022-Oct-19	Sergey Kisilev	Non-Compliance(s) Found	
<a href="#">2022-0205</a>	2022-Oct-13	Charles Webster	Non-Compliance(s) Found	
<a href="#">2022-0212</a>	2022-Oct-12	Roberta Press	Non-Compliance(s) Found	

### Please Note

By default, the search results table will display all Inspections with Issued Non-Compliance Notices. To view Inspections that were In Compliance, change the Status drop-down filter to either 'Any Outcome' or 'In Compliance'.

## 9.2.1 Column Header Definitions

The Inspections search screen presents rows of Inspection results, with each row containing the following:

**INSPECTION #:** The unique number assigned to an Inspection after it has been 'Issued', presented in the format of YYYY-NNNN.

**INSPECTION DATE:** The date of the Inspection.

**ASSIGNED TO:** Identifies the BCER user that the Inspection is currently assigned to.



**OUTCOME:** Indicates whether the outcome of the Inspection was In Compliance or Non-Compliance(s) Found.

**NON-COMPLIANCES:** Indicates if there is one or more currently issued (not yet resolved) Non-Compliances as a result of the Inspection.

## 9.2.2 Search Features

The Inspection Search screen offers the flexibility to either find one specific Inspection, or a group of Inspections, depending on the selected search criteria.

Each column of data on the search screen is equipped with a search icon. When selected, a search box will be displayed. Every column of information is represented by a unique type of search box, tailored for the information contained in that column. There are three types of search boxes:

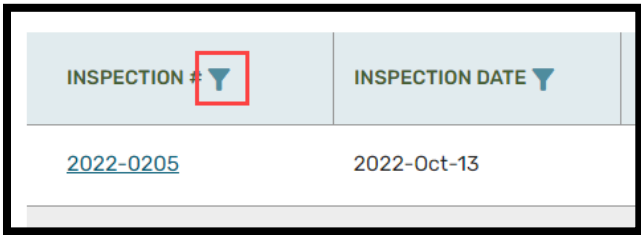
### Type-ahead Search Box

The type-ahead search boxes are used to either find a specific value, or groups of value, when only partial search information is known.

The following fields have type-ahead search boxes:

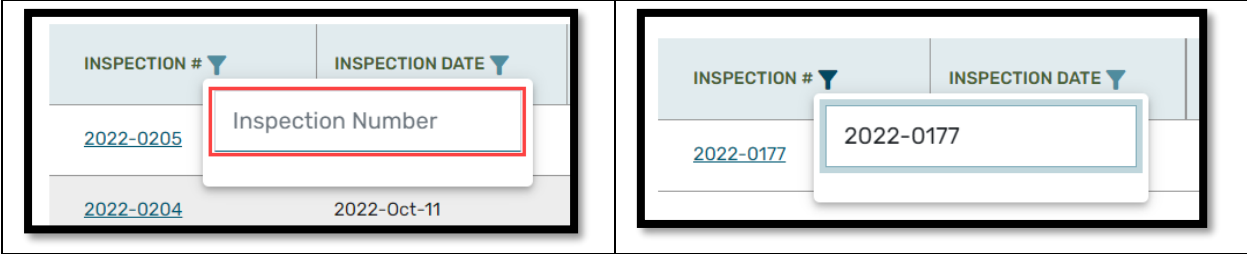
- INSPECTION #
- ASSIGNED TO


To search for a specific Inspection, select the  icon, situated to the right of the column header.

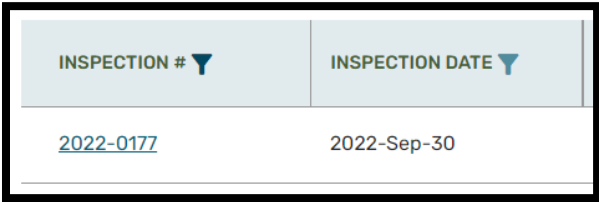


Once the type-ahead search box opens, enter any numerical value that matches the Inspection that is the target of the search.

<input type="text"/>	<input type="text"/>
----------------------	----------------------



The results of the search will be displayed. To remove the type-ahead search box, either click the  icon again, or click anywhere on the screen.




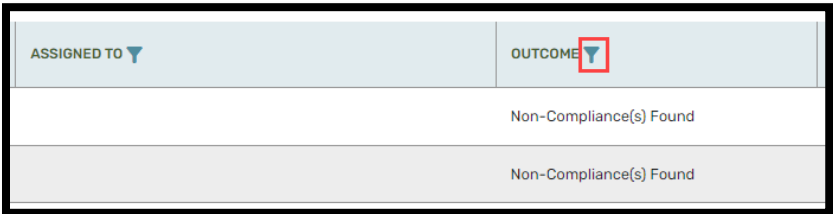
### Drop-Down List Search Box

The drop-down list search box is used when there is a limited list of values that can be selected.

The following fields have type-ahead search boxes:

- OUTCOME

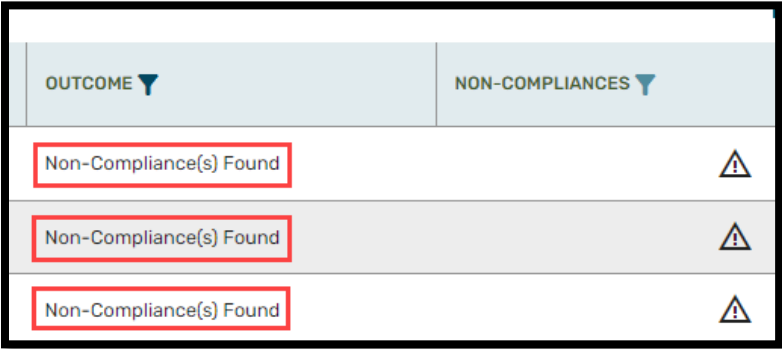
To search for Inspections that meet specific criteria, first start by selecting the  icon, situated to the right of the column header.



Select one of values presented in the drop-down list.



The list of Inspections will match with the selected value.



### Date Search

The date search box allows the user to select Inspections within a specified date range.


The following fields have date filters:


- INSPECTION DATE

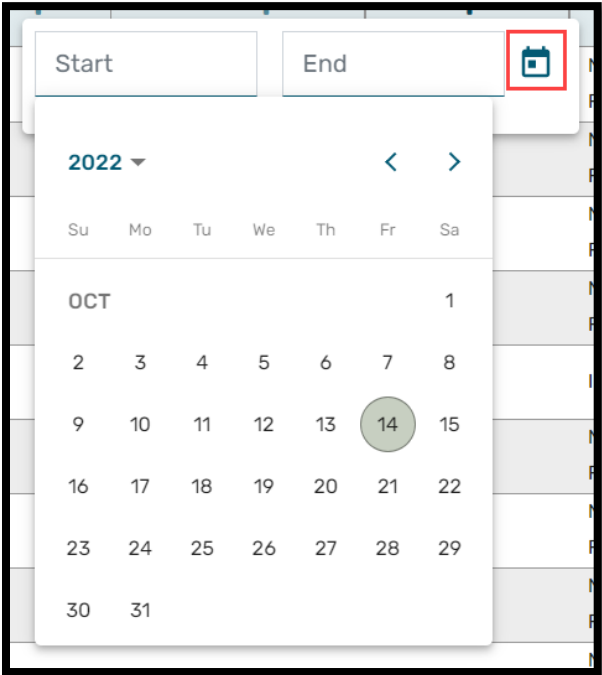
Start by selecting the  icon.

INSPECTION # ▼	INSPECTION DATE ▼
<a href="#">2022-0205</a>	2022-Oct-13

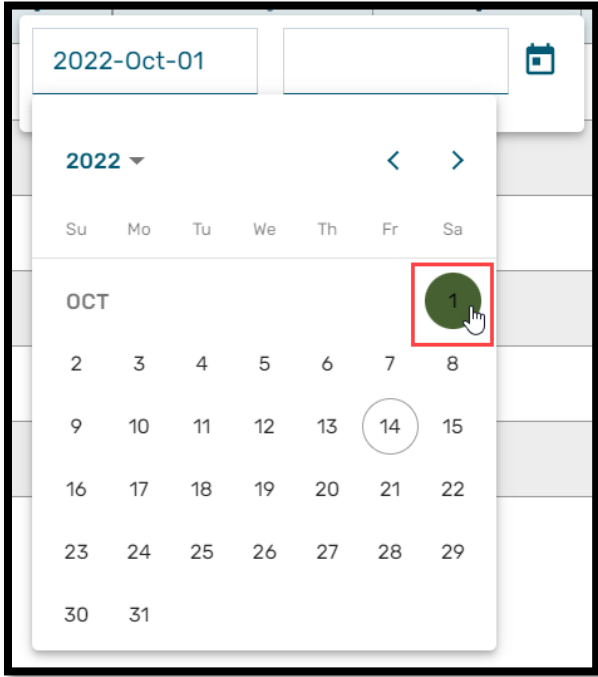
Click on either the Start or End date field to select it.


INSPECTION DATE ▼	ASSIGNED TO ▼	STATUS ▼
2022-Oct-13	<input type="text" value="Start"/>	<input type="text" value="End"/> 
2022-Oct-11	Roberta Press	Completed

Use the  icon to select a date.



In this example, the Start Date selected will be Oct. 1, 2022.



The results of the search will be displayed. To remove the date selection box, either click the  icon again, or click anywhere on the screen.

**Note:**

If the user has only entered a Start Date, the End Date of the search will be today’s date.

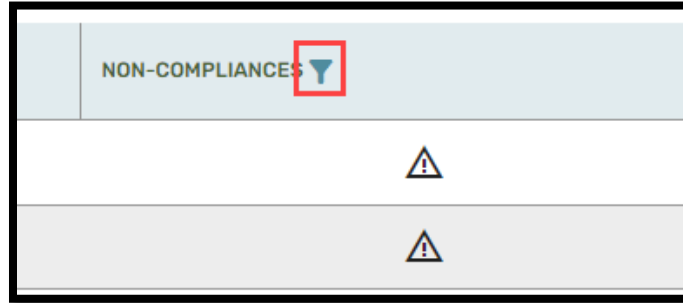
**Toggle (Checkbox) Search**

The checkbox search box is a quick way to toggle on and off specific search parameters.

The following fields have toggle checkboxes:

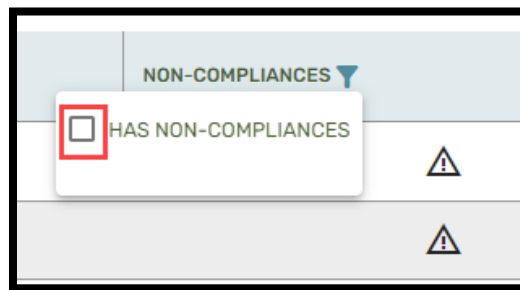
- NON-COMPLIANCES

Start by selecting the  icon.




To search for Inspections that have Issued (current unresolved) Non-Compliances, select the

To toggle search functionality to view only Non-Compliances that are being enforced against a PERMIT, select the  HAS NON-COMPLIANCES checkbox.




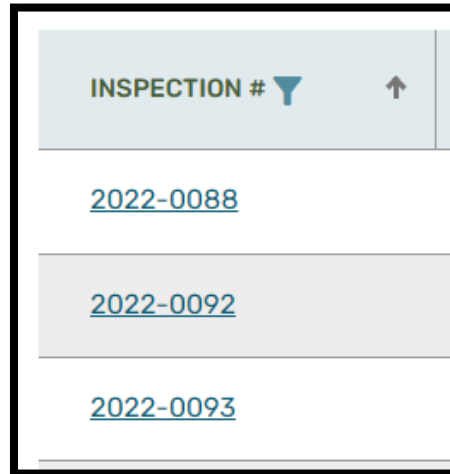
### 9.2.3 Sort Features


Each of the columns in the Inspection search screen can be sorted, either ascending (lowest to highest), or descending (highest to lowest), based on the values that are currently in the column. The default sort order is ascending.

There are two options to sort any column: Sort using the  icons, or sort using the column header.

#### Sort by Sort Icon



Sort by clicking the sort icon , which is located at the far right of the column header. In the example below, the INSPECTION # column is being sorted in ascending order (lowest to highest).



INSPECTION # 
<a href="#">2022-0088</a>
<a href="#">2022-0092</a>
<a href="#">2022-0093</a>

To change the order to descending, click the sort icon again to trigger the descending sort .

### Sort by Column Header

Columns of data can also be sorted by clicking the column header. Notice that when clicking the column header, the sort icon will change direction, indicating if the sort is ascending , or descending .

## 9.2.4 Using the Search Criteria Menu

The Criteria Menu is a single source collection of all searchable data elements for the Inspections Search Screen.

Open the Criteria Menu by selecting the  button from the Inspections Search Screen.

## Criteria Definitions

Just like the Non-Compliance search screen, the Criteria menu has the same set of data fields that can be used to change the search criteria.

**INSPECTION #:** The unique number assigned to an Inspection after it has been 'Issued', presented in the format of YYYY-NNNN.

**INSPECTION DATE:** The date of the Inspection.

**ASSIGNED TO:** Identifies the BCER user that the Inspection is currently assigned to.


**INSPECTION OUTCOME:** Indicates whether the outcome of the Inspection was In Compliance or Non-Compliance(s) Found.

**INSPECTION HAS NON-COMPLIANCES:** Indicates whether there are one or more current issued (not yet resolved) Non-Compliances as a result of the Inspection.

## Searching by Inspection #

Inspection # is a search box that can be used to either find a specific Inspection or a group of Inspections that match part of the number.

Inspection # is always in the format of YYYY-NNNN, for example 2022-0020.

Enter the number, or partial number, and click  .



INSPECTION #  
1234

### Searching by Inspection Date

The date search boxes allow the user to select Inspections within a specified date range.

Click on either the Start or End date field to select it.

INSPECTION DATE  
Start End

Then use the icon to select a date.

INSPECTION DATE  
2022-Oct-01

2022 < >

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Search

In this example, the Start Date selected will be Oct. 1, 2022.

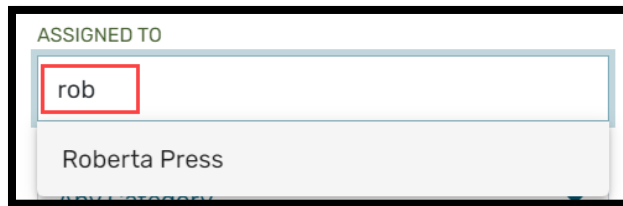
**Please note:**

The user may enter either a Start Date, or an End Date, or both.  
 If only entered a Start Date is entered, the End Date of the search will be today’s date.  
 If only an End Date is entered, the Start Date will be from the earliest Inspection that meets the other search criteria.

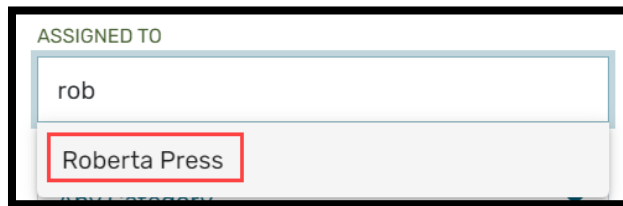
**Searching by Assigned To**

Assigned To is a type ahead search box that can be used to search for Inspections that are currently assigned to a particular person at the BCER.

Begin typing some letters from the individual’s name. The system will automatically begin providing a list of people with those letters in their name.

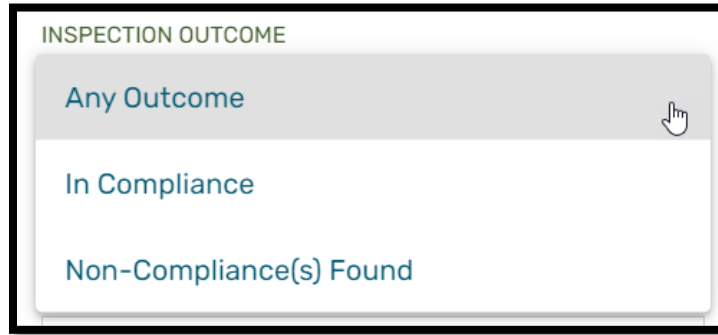


Select a name from list to populate the field.



**Searching by Inspection Outcome**

The user can select ‘Any Outcome’ and the search will return all Inspections with an outcome of In Compliance’ or ‘Non-Compliances Found’. If the user searches by a specific outcome, the search will only return Inspections with that Outcome.



### Inspection Has Non-Compliances Toggle (Checkbox)

The 'Inspection Has Non-Compliances' checkbox is a quick way to toggle off and on the filter to display only Inspections with Issued (unresolved) Non-Compliance(s).


To toggle the search to view only Inspections with Issued Non-Compliance(s), select the  INSPECTION HAS NON-COMPLIANCES checkbox.





To view all Inspections again, un-select the  INSPECTION HAS NON-COMPLIANCES checkbox.



### Cancel, Reset, or Apply

To apply the current search parameters, after making selections select the  button.

To cancel the current operation, and close the menu, select the  button.

To reset the search parameters to the default settings of displaying only Non-Compliances 'Issued' to the currently selected Permit Holder, select the  button.

## Chapter 10: Viewing a Completed Inspection

### 10.1 Opening an Inspection for Viewing

There are multiple ways to open an Inspection for viewing.

#### Inspections Dashboard

Click on any Inspection in the dashboard to open it.

#### Find an Inspection

Search for any Completed Inspection belonging to the currently selected Permit Holder.

See Section 9.1 Searching for an Inspection for more details.

#### Advanced Search Inspections Screen

Click on any Inspection in the search results table to open it.

See Section 9.2 Using the Advanced Search Inspections Screen for more details.

INSPECTION #	INSPECTION DATE	ASSIGNED TO	STATUS	OUTCOME	CATEGORY	ACCESS METHOD	INSPECTION AREA	NON-COMPLIANCES
2022-0205	2022-Oct-13		Completed	Non-Compliance(s) Found	Planned Inspection Program	Truck	North	⚠
2022-0204	2022-Oct-11		Completed	Non-Compliance(s) Found	Drilling Rig	Truck	South	⚠
2022-0190	2022-Oct-07		Completed	Non-Compliance(s) Found	Drilling Rig	Helicopter	North	⚠

## 10.2 Viewing the Inspection

On the Inspection, the user can navigate to the following tabs:

1.	Details	Basic details of the Inspection including the date, the BCER user assigned to the Inspection, and any comments entered by the BCER
2.	Notebook	Additional documentation including the Inspection report, other documents, images, emails, and annotations
3.	Gallery	Quick view of all images uploaded to the Inspection
4.	Non-Compliance	View and address Non-Compliances that came out of the Inspection

[Home](#) < [PETRONAS Energy Canada Ltd.](#) < [Dashboard](#) < Inspection 2022-0220

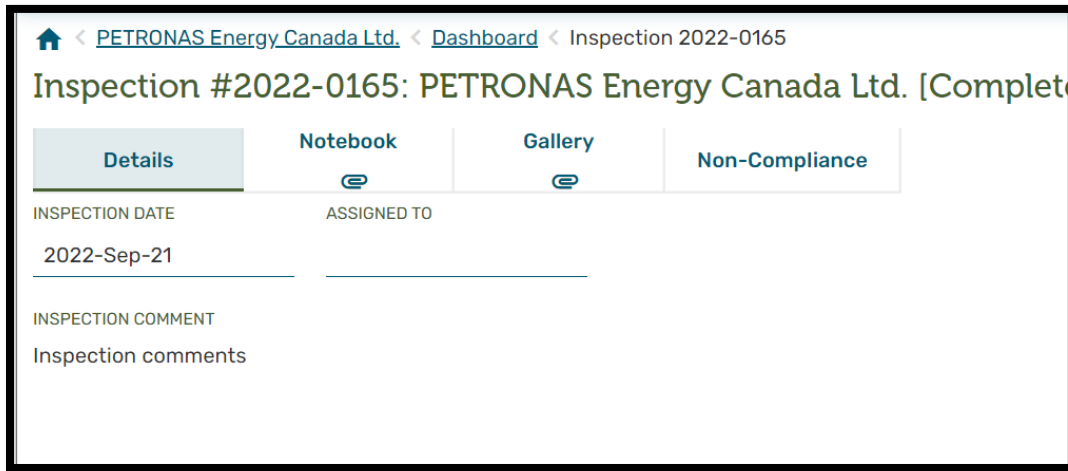
**Inspection #2022-0220: PETRONAS Energy Canada Ltd. [Completed - Non-Compliance(s) Found]**

Details
Notebook
Gallery
Non-Compliance

INSPECTION DATE: 2022-Sep-23
 ASSIGNED TO: \_\_\_\_\_

INSPECTION COMMENT: *None*

## 10.3 Details Tab



The Inspection Details include the following information:

**INSPECTION DATE:** The date that the Inspection was conducted

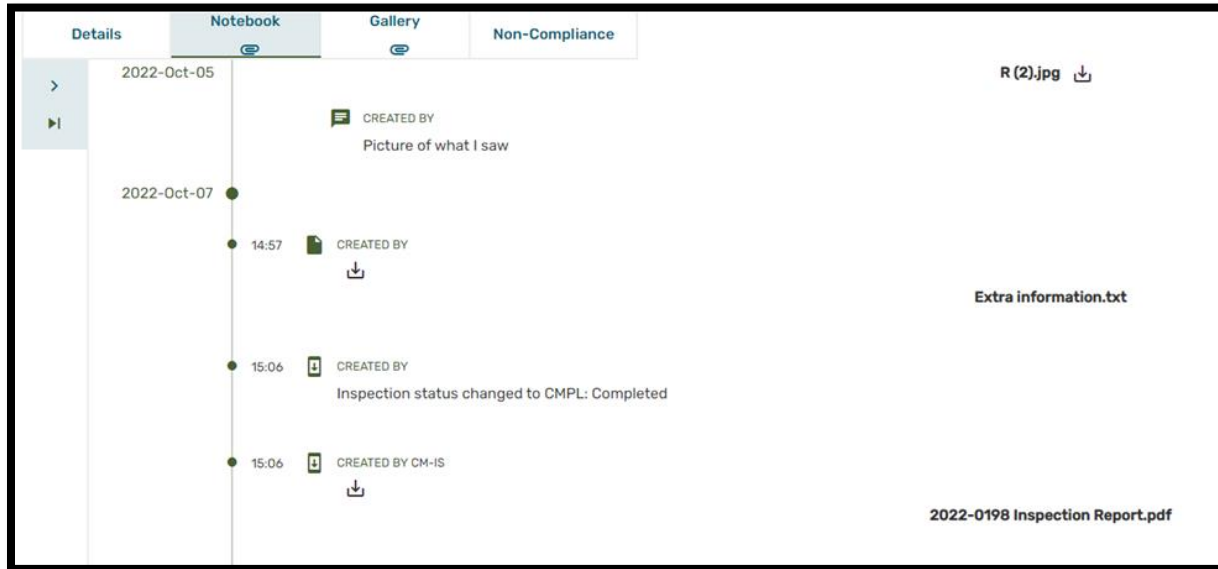
**ASSIGNED TO:** The person that recorded the Inspection information and conducted the Inspection.

**INSPECTION COMMENT:** Any relevant comments that the C&E Officer would like to relay to the Permit Holder regarding the Inspection.

## 10.4 Notebook Tab

The Notebook provides copies of any Inspection Notifications or Reports sent to the Permit Holder as well as email correspondence and images that the BCER deems relevant to assist the Permit Holder in understanding the results of the Inspection.


Please note that the Inspection itself has a Notebook, and each associated Non-Compliance also has its own separate Notebook. Please see [Chapter 5: Working with the Non-Compliance Notice](#)

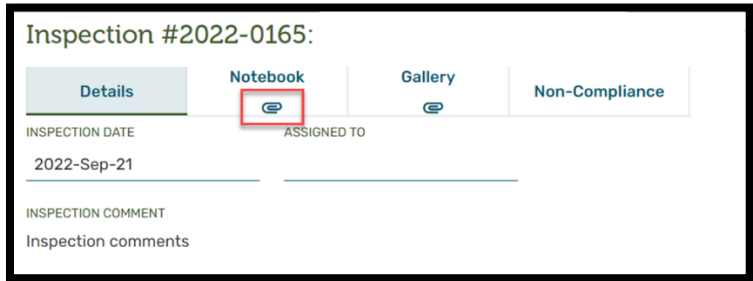


### Notebook Content

The following items can be found in the Notebook:


- Uploaded files, including images
- Uploaded emails
- Copies of the system-generated emails
- Inspection reports
- Inspection status changes
- Inspection or Non-Compliance reassignments

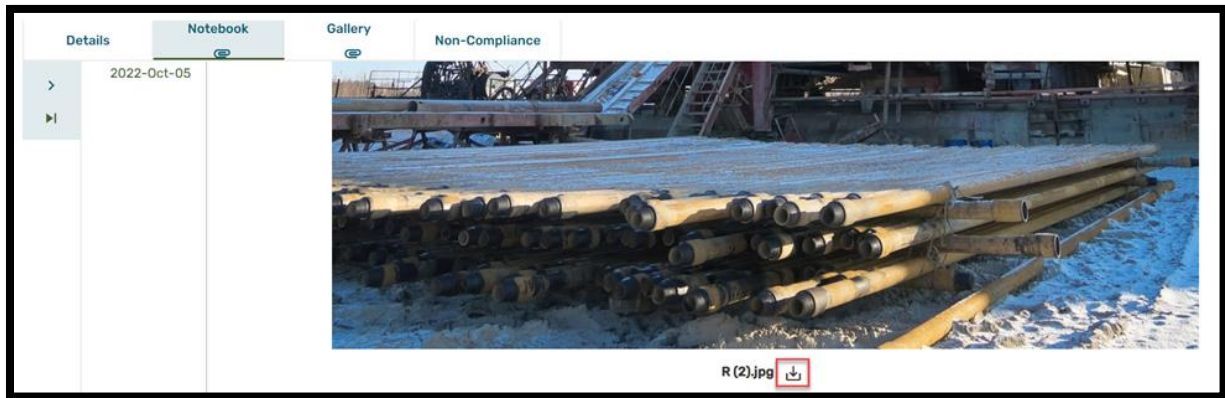
There will be a  icon displayed on the Notebook tab when additional information is available to view.



## Viewing and Downloading and Image


Images that were uploaded to the Inspection will be visible in the Notebook.

To download an image, click on the  icon at the bottom of the image. Once the image has been downloaded, select the picture file and open it in a desktop viewer.



## Downloading a Document or File


Any documents attached to the Inspection, including the Inspection Report, will be available in the Notebook.

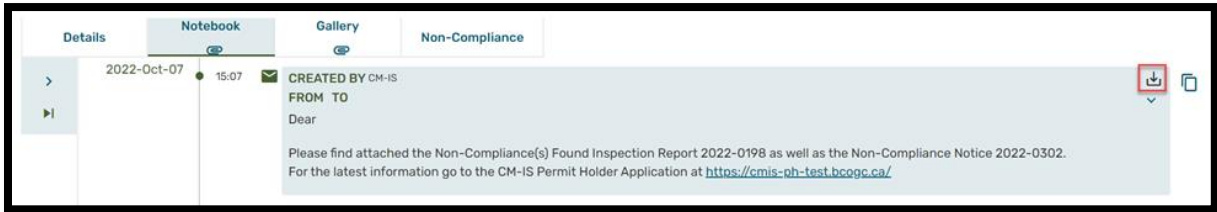
To download a document for viewing, click on the  icon. Once the file has been downloaded, select the file and open it in a desktop application.





### Downloading an Email

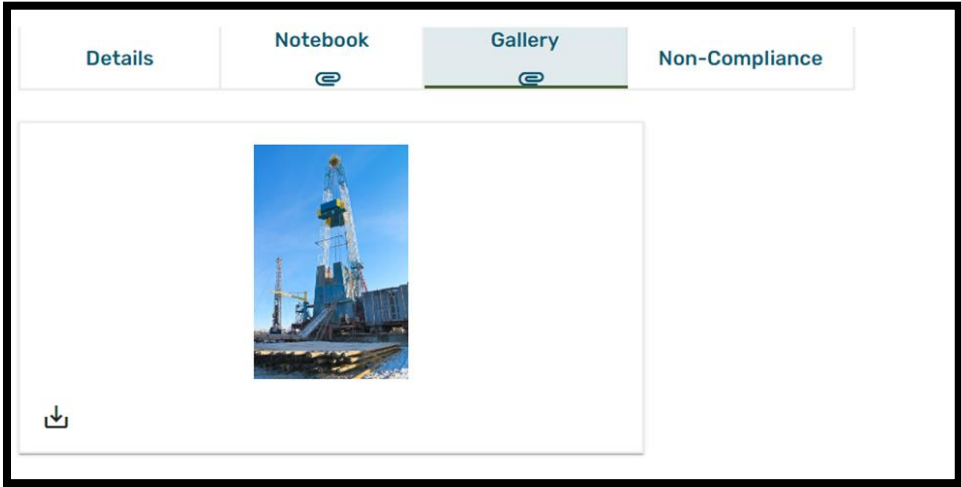
To download an email, click on the  icon. Once the email has been downloaded, select the file and open it in a desktop email application (ex. Outlook).




Please note that some emails may be manually entered and cannot be downloaded.

## 10.5 Gallery Tab

The Gallery displays a consolidated list of all images attached on the Notebook in a thumbnail format. The Permit Holder can navigate and view the full-sized images as well as download the individual images.



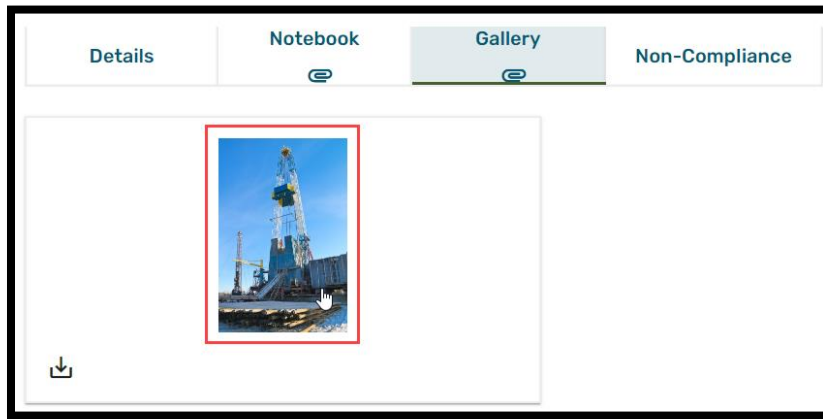
There will be a  icon displayed on the Gallery tab when there are images available to view.




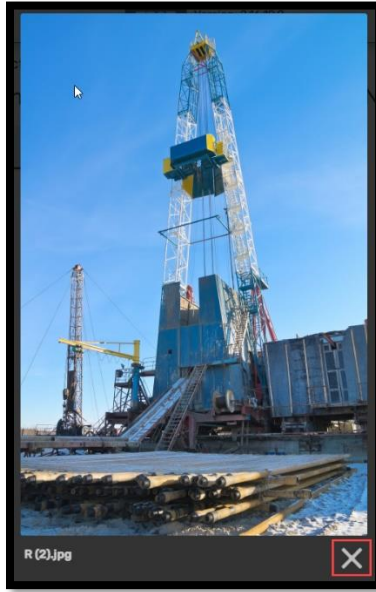
### Viewing Images

Images that were uploaded to the Inspection will be visible in the Gallery Tab in thumbnail format.


Click on any thumbnail for an expanded view of the image.

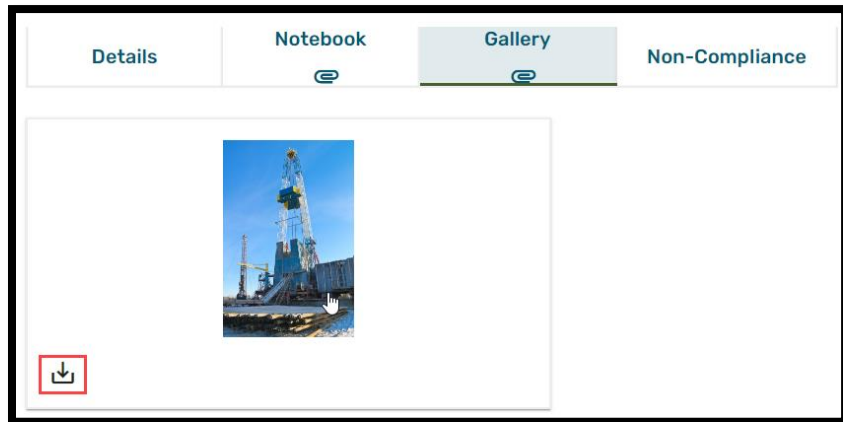


Click on the  to close the image.



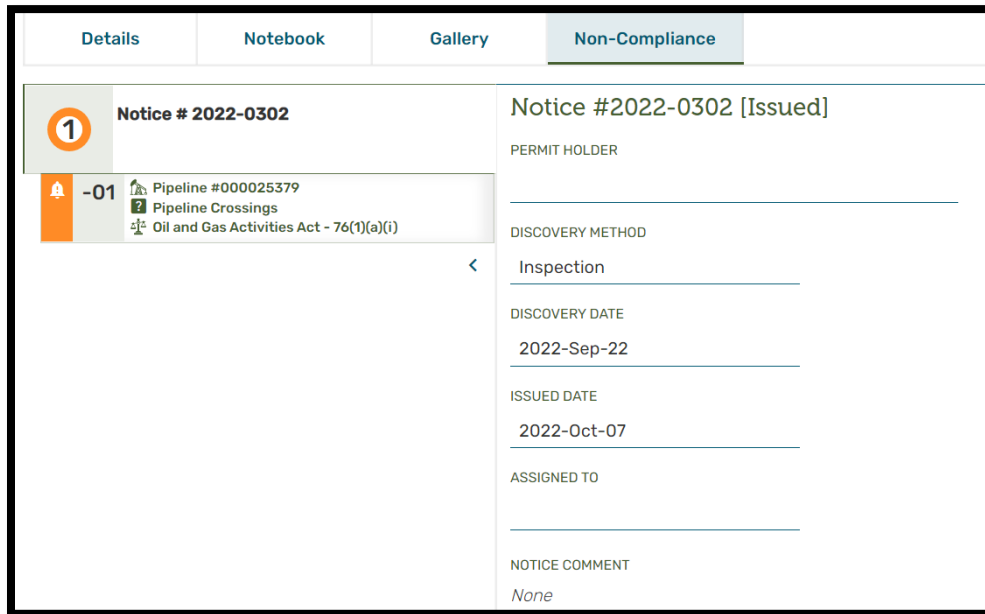
## Downloading Images

To download an image, click on the  icon. Once the image has been downloaded, select the picture file and open it in a desktop viewer.



## 10.6 Non-Compliance Tab

The Non-Compliance tab is only available for Inspections that were completed with Non-Compliance(s) Found. Clicking on this tab navigates to the Non-Compliance Notice associated with the Inspection. Please see [Chapter 5: Working with the Non-Compliance Notice](#)

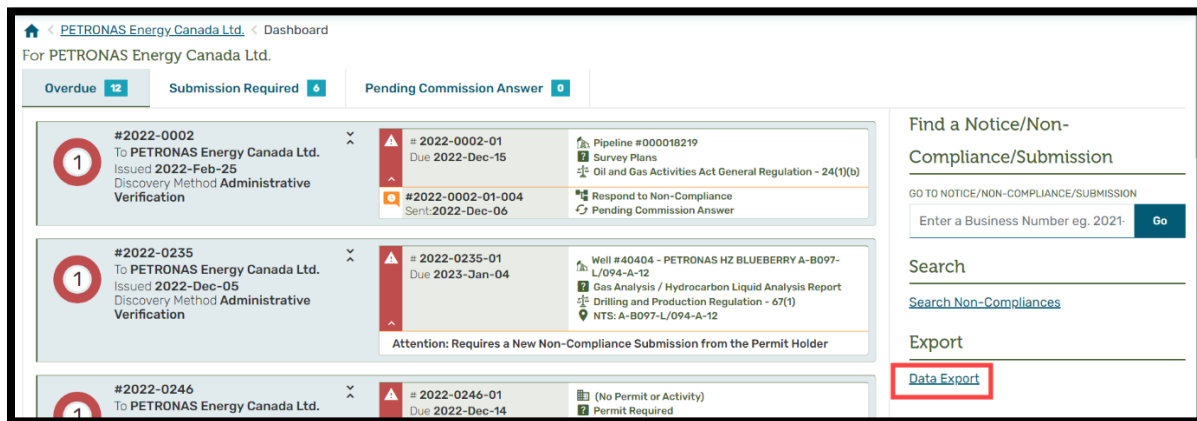
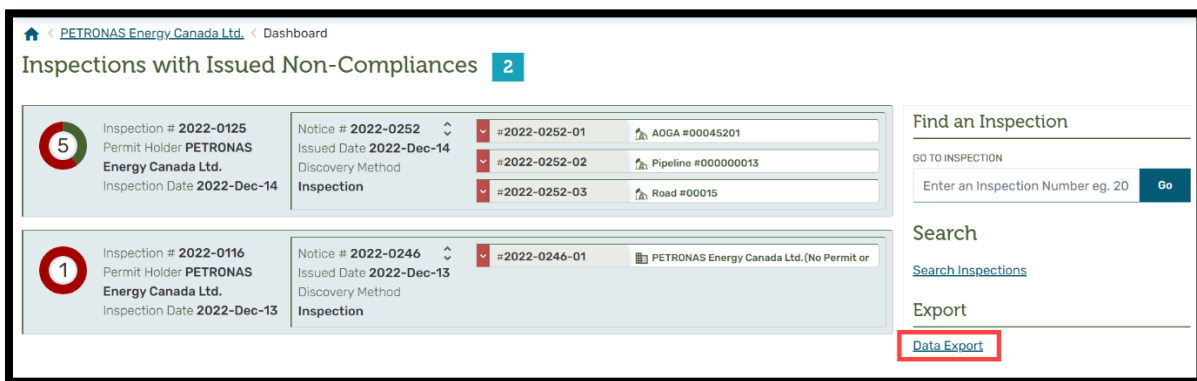


## Chapter 11: Data Exports

### 11.1 Exporting Data for Inspections and Non-Compliances for the Permit Holder

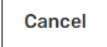
The Permit Holder can export a CSV file of all their Inspections and Non-Compliances.

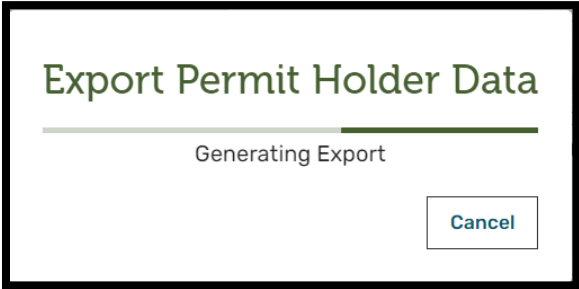
The Data Export can be found on both the Inspections dashboard and the Non-Compliances dashboard.



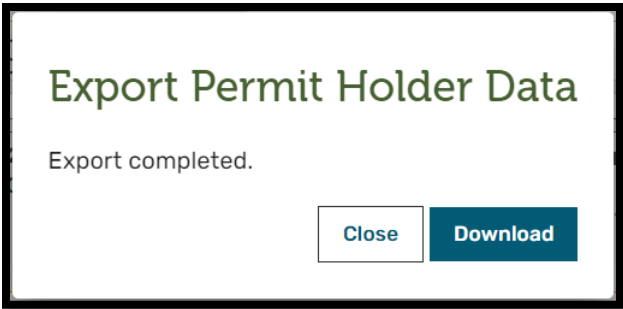
The Data Export will only include data that the user has permission to view. To view all data the user will need both Administrative Non-Compliance Representative and Inspection Representative user roles. If the user only has one of these roles, only the data available to that user role will be included in the Data Export.


The file will contain all the information available for the Inspection, Non-Compliance Notice, and individual Non-Compliances as seen on their details screens except for the Attachments and Notebook entries.

Clicking on the [Data Export](#) link will create the file. While CM-IS is composing the information, the user will see a dialogue progress box. The user can select the  button if they wish to abandon the process and not create the file, or wait until the process completes.



When the file is ready, the user is presented with the following dialogue box.

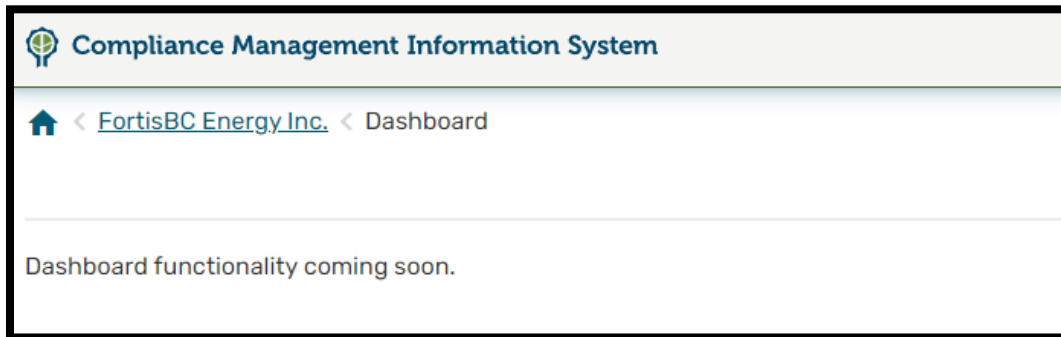


The user can select the  button to allow the browser to download the export file or Close to exit without getting a copy of the file. The name of the file defaults to 'Data Export.csv'.

## Chapter 12: Incident Dashboard

### 12.1 Using the Incident Dashboard

BCER is still working on the Incident Dashboard functionality, and it will be coming soon in a future release.

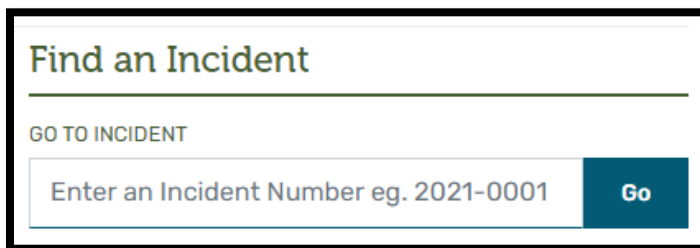


## Chapter 13: Searching an Incident

### 13.1 Searching for an Incident

To find a specific Incident, enter the corresponding number into the GO TO INCIDENT field under the 'Find an Incident' banner.

- To find an Incident, enter its number, for example 2024-0001



The screenshot shows a search form titled "Find an Incident". Below the title is a horizontal line. Underneath, the text "GO TO INCIDENT" is displayed. There is a text input field containing the placeholder text "Enter an Incident Number eg. 2021-0001". To the right of the input field is a blue button labeled "Go".

- If the number cannot be found, an error message will appear:



The screenshot shows the same search form as above, but with the input field containing "2024-0001". A red border highlights the input field, and a red warning icon (an exclamation mark inside a circle) is visible to the right of the input field. Below the input field, the text "Incident not found" is displayed in red. The "Go" button is still present to the right.

### 13.2 Using the Advanced Incident Search Screen

The Incident Search screen is a searchable and sortable tabular list of Incidents.

Access the Incidents Search screen from the Incidents Dashboard, under the 'Find an Incident' banner, by selecting the [Search Incidents](#) link.



When opened, the Incident Search screen will default to displaying Minor (with status of Draft – created by the Permit holder, Response, Review and Completed) and Leveled Incidents (with Status of Response, Review and Completed) of the Permit Holder (*as selected when the user logged on or subsequently changed*).

## 13.3 Column header definitions

The Incident search screen presents rows of Incident results with each row containing the following:

**Incident Number:** The unique number assigned to an Incident after its been ‘Submitted’, presented in the format of YYYY-NNNN.

- NOTE: The user can click on the Incident Number (or the word “Draft”) to be taken to the Incident Details page

**DGIR/GIR:** The DGIR or GIR number from EMCR, if applicable

**Status:** Indicates the current status of the incident (Draft, Response, Submitted, Review, Completed)

**Discovery Date:** The reported Discovery Date of the Incident

**Incident type(s):** Incident can be sorted or filtered by the type(s) of the Incident (such as Spill (Solid or Liquid), Spill (Gaseous), Drilling Kick, Induced Seismicity, Equipment/Structural Damage, Hydrotechnical, Fire/Explosion, Security (Theft, Threat, Sabotage, Terrorism), Vehicle/Heavy Equipment, Loss of Well Control, Geotechnical, Environmental Threat and Other)

**Activity Type:** The Activity associated to the Incident, ex. Well, Facility, Pipeline, etc.

**Level:** The Incident's Level

## 13.4 Search Features

The Incident Search screen offers the flexibility to either find one specific Incident, or a group of Incidents, depending on the selected search criteria.

Each column of data on the search screen is equipped with a search icon. When selected, a search box will be displayed. Every column of information is represented by a unique type of search box, tailored for the information contained in that column. There are three types of search boxes:

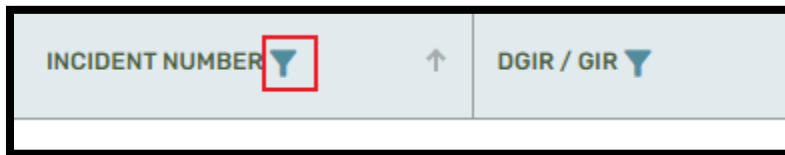
### 13.4.1 Type-ahead Search Box

The type-ahead search boxes are used to either find a specific value, or groups of value, when only partial search information is known.

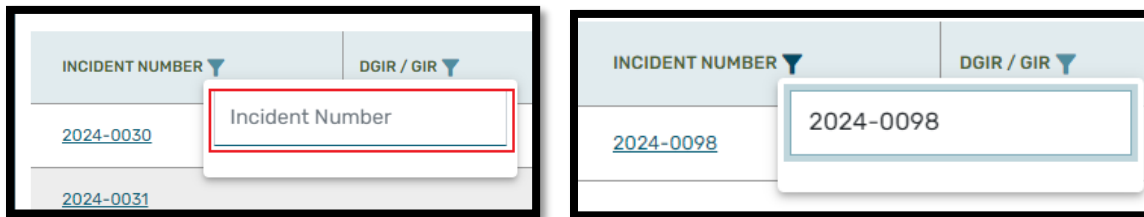
The following fields have type-ahead search boxes:


- Incident number
- DGIR/GIR

To search for a specific Incident, select the  icon, situated to the right of the column header.




Once the type-ahead search box opens, enter any numerical value that matches the Incident that is the target of the search.

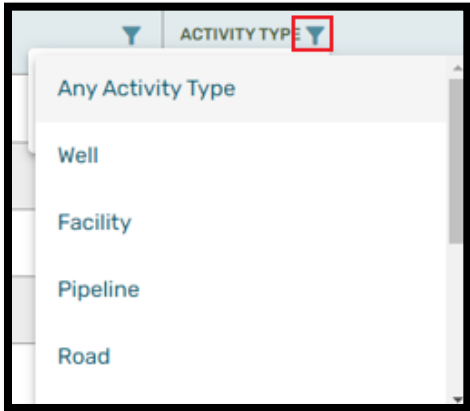


The results of the search will be displayed. To remove the type-ahead search box, either click the  icon again, or click anywhere on the screen.

### 13.4.2 Drop-Down List Search Box

The drop-down list search box is used when there is a limited list of values that can be selected.

To search for Incidents that meet specific criteria, first start by selecting the  icon, situated to the right of the column header.



The following fields have Drop-Down list search box:

- Incident Type(s)
- Activity type

Select one of values presented in the drop-down list. The list of Incidents will match with the selected value.

INCIDENT TYPE(S) 	ACTIVITY TYPE 	LEVEL 
Spill (Solid or Liquid)	<input type="text" value="Well"/>	Level 1
Spill (Solid or Liquid)	<input type="text" value="Well"/>	Level 1

### 13.4.3 Toggle (Checkbox) Search

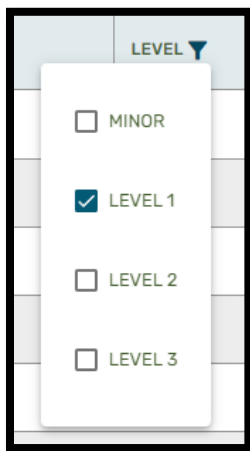
The checkbox search box is a quick way to toggle on and off specific search parameters. Below are the specific toggle searches:

- Status
- Level

Start by selecting the  icon.



To search for incidents with different levels (Currently Level 1) Incidents.




### 13.4.4 Date Search

The date search box allows the user to select Incidents within a specified date range.

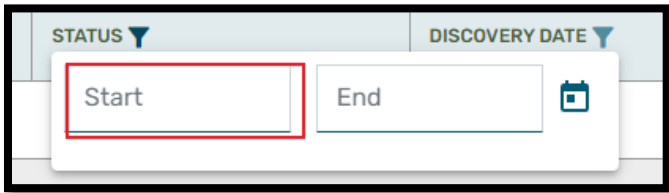
The following fields have date filters:


- DISCOVERY DATE

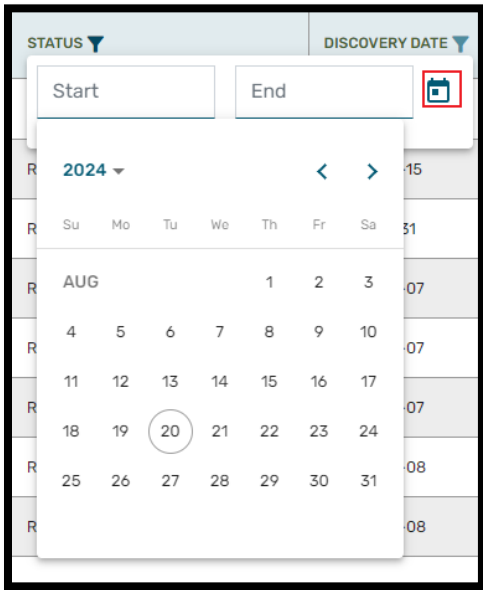
Start by selecting the  icon.



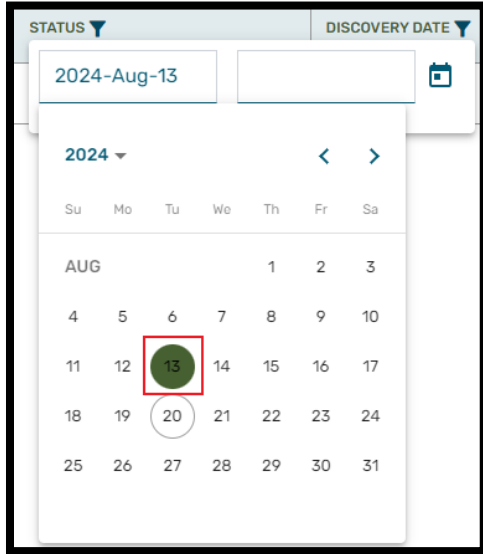
Click on either the Start or End date field to select it.




Use the  icon to select a date.



In this example, the Start Date selected will be Aug. 13, 2024.




The results of the search will be displayed. To remove the date selection box, either click the  icon again, or click anywhere on the screen.


**NOTE:** If the user has only entered a Start Date, the End Date of the search will be today’s date.

### 13.5 Sort Features

Each of the columns (except Incident types) in the Incident search screen can be sorted, either ascending (lowest to highest), or descending (highest to lowest), based on the values that are currently in the column. The default sort order is ascending.


There are two options to sort any column: Sort using the  icons, or sort using the column header.

## 13.5.1 Sort by Sort Icon



Sort by clicking the sort icon , which is located at the far right of the column header. In the example below, the Incident # column is being sorted in ascending order (lowest to highest).



INCIDENT NUMBER  
<a href="#">2024-0010</a>
<a href="#">2024-0011</a>
<a href="#">2024-0019</a>
<a href="#">2024-0081</a>
<a href="#">2024-0097</a>

To change the order to descending, click the sort icon again to trigger the descending sort .

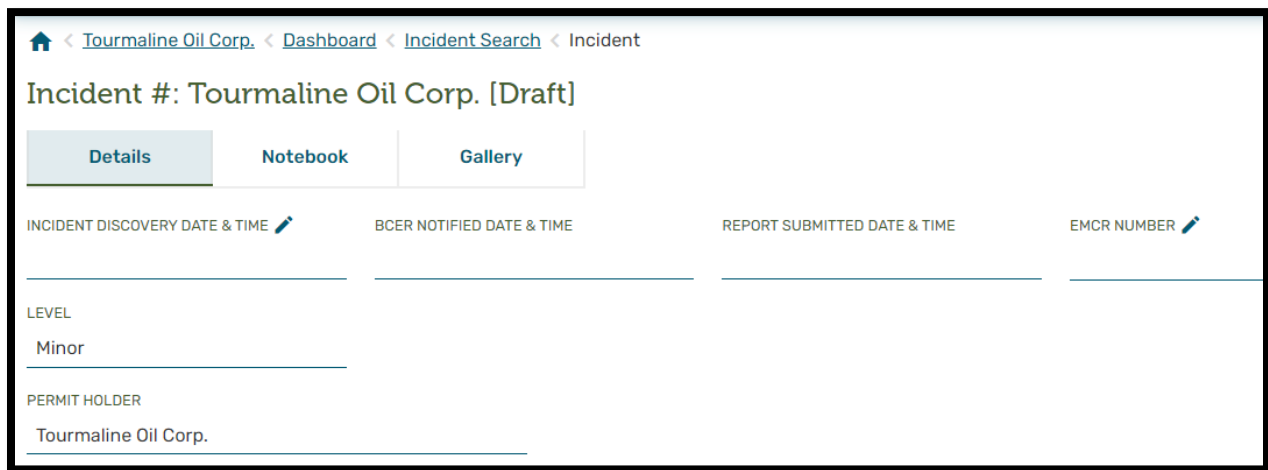
## 13.5.2 Sort by Column Header

Columns of data can also be sorted by clicking the column header. Notice that when clicking the column header, the sort icon will change direction, indicating if the sort is ascending , or descending .

## CHAPTER 14 Viewing an Incident

On the Incident, the user can navigate to the following tabs:

1.	Details	Basic details of the Incident including the date, contacts, Incident description and other Incident related information.
2.	Notebook	Additional documentation including the Spill report, other documents, images, emails, and annotations
3.	Gallery	Quick view of all images uploaded to the Incident



### 14.1 Content of the Incident Details Tab

The Incident Search page screen displays the following data:

NOTE: Some fields showing in 'grey' in the contents below only shows up in Leveled incidents, they will not be available for Minor incidents. Users should be able to search and view leveled incidents using the Advanced Incidents search page.

- **Incident Discovery Date & Time:** The date and time the Incident was discovered. Can be recorded as PST or MST.



- **Report Submitted Date & Time** (Minor Incidents only): The date and time the Incident was submitted (usually by the Permit Holder) to BCER. The data in this field is set by the system and cannot be changed.
- **EMCR Number**: The DGIR or GIR number given to the Incident by EMCR.
- **Level**: The Level of the Incident. Minor (Permit Holders can only create a Minor incident), Level 1 (Moderate), Level 2 (Major), or Level 3 (Serious).
- **Public Interest Indicator** (Leveled Incidents only): Indicates if there is potential public interest in this Incident.
- **EOC Activated** (Leveled Incidents only): Indicates that the Emergency Operations Centre has been activated.
- **EOC Director** (Leveled Incidents only): Name of the individual who is acting as the Emergency Operations Centre Director, only if the EOC has been activated.
- **Permit Holder**: The name of the Permit Holder associated to the Incident.
- **Intake Situation** (Leveled Incidents only): The initial assessment of the Incident upon intake. Options are Evolving or Stable. This field can only be edited while the Incident has the Status of Draft; once the internal email notification has been sent out, this field can no longer be changed.
- **Location\***: Information to help identify the exact location of the Incident
  - **Activity Type**: Well, Facility, Pipeline, Road, AACT/ANC, Changes in and About a Stream, Short Term Water Use, Geophysical Program, Other
  - **Field Name**: Name of the oil field
  - **Location Category**: Urban, Rural, or Remote
  - **NTS/DLS**: National Topographic Survey or Dominion Land Survey coordinates
  - **UTM (NAD83)**: Universal Transverse Mercator coordinates
  - **GPS**: Global Positioning System coordinates
  - **Location Description**: Written description to help identify the location of the Incident
- **Incident Description**: Written description of the Incident, including what actions the Permit Holder has taken so far

- **Staff Dispatched:**
  - **Field Staff Assigned:** The name of the C&E Officer or Environmental Response Specialist assigned to this Incident (if any); also the option of “To Be Determined”. Entering a name in this field will assign the Incident to that individual, who will have to complete an initial field response before the Incident itself can be completed
  - **Additional BCER Staff Responding:** The name(s) of any other staff from BCER that are responding to the Incident
- **Contacts:** Permit Holder contacts. A contact of type “Reporter” is required, all other contact types are optional
- **Regulatory Oversight:**
  - **Out of Jurisdiction:** Indicates that this Incident is outside of BCER's jurisdiction
  - **Not Reportable Incident:** Indicates that this Incident does not qualify as a Reportable Incident
  - **Explanation** (visible only when “Out of Jurisdiction” or “Not Reportable Incident” has been checked): Explanation for why this Incident is Out of Jurisdiction or Not a Reportable Incident
  - **Other Agencies:** List of any external agencies involved in the Incident (ex. RCMP)
- **Additional Recipients** (visible only when internal email notifications will be sent by the system): The user can add up to ten additional recipients to the internal email notification. This field cannot be changed after the email notification has been sent out.
- **Incident Discovered By:** Indicates who discovered the Incident (Company/Contactor, Third Party, or BCER).
- **Incident Type(s):** The type(s) of the Incident.
- **Main & Secondary Industry Activities:** The main and secondary industry activities.
- **Material Information** (only if Incident Type is a spill): If the Incident is a Spill, the material(s) spilled and the H2S content.
- **Environment Affected** (only if Incident Type is a spill): If the Incident is a Spill, the type of environment(s) affected.
- **Land Classification** (only if Incident Type is a spill): If the Incident is a Spill, the land classification(s) of the area(s) affected.

- **Confined to Lease or Right of Way** (only if Incident Type is a spill): If the Incident is a Spill, indicates whether or not the spill was confined to the lease or right of way.
- **Why Unknown** (only if Confined to Lease or Right of Way is “unknown”): If the Incident is a Spill and the user has indicated that it's unknown whether or not the spill was confined to the lease or right of way, this fields contains the explanation of why this information is unknown.
- **Initial Solid or Liquid Spill Volume** (only if Incident Type is a solid or liquid spill): If the Incident is a Spill (Solid or Liquid), the initial recorded solid or liquid spill volume.
- **Initial Gaseous Spill Volume** (only if Incident Type is a gaseous spill): If the Incident is a Spill (Gaseous), the initial gaseous spill volume.
- **Public Impacts** (Leveled Incidents only): List of impacts the Incident has had on the public.
- **Other Impacts**: Impacts to wildlife/livestock, equipment loss, and/or ancillary damage.
- **Contractors or Third Parties Directly Involved**: Names and phone numbers of any contractors or third parties involved in the Incident.

\*Note on Location: The user must enter some identifying information so that BCER can locate the Incident. The information required depends on the Incident's Activity Type and the status of the Incident in CM-IS (i.e. If the Incident is still in Intake, or if it is in Review, etc.). Less specific location information is required when the EO triggers the internal email notification on a Leveled Incident versus when that Incident's Intake is considered complete and it is moving on to the Incident Review stage.

Note: Below fields are not editable:

- BCER Notified Date & Time
- Report Submitted Date & Time
- Permit Holder
- Level
- Contact type - Reporter

## 14.2 Incident Statuses

**Draft**: A new Incident record. Draft Incidents do not yet have an Incident Number assigned.

**Draft Minor Incident:** The Incident has not yet been Submitted (usually done by the Permit Holder, but BCER can create a Minor Incident on the Permit Holder's behalf).

**Draft Leveled Incident:** The Incident's internal email notification has not yet been sent out.

**Submitted:** Minor Incidents only. The Incident has been Submitted (usually by the Permit Holder). Emergency Management is checking to ensure the submitted information makes sense and is finalizing the Incident's intake

**Response:** Leveled Incidents only. The Incident's internal email notification has been sent. The Emergency Officer is working with the Permit Holder to gather required information and is finalizing the Incident's intake

**Review:** Both Minor and Leveled. Incident Intake is finalized. The three specialty groups (Emergency Management, Technical, and Environmental) are assessing the Incident to determine if an Incident Review is required. If it is, the specialty group(s) are waiting on the Permit Holder to submit an acceptable Incident Review

**Completed:** There are no outstanding Incident Reviews and there is no further action required at this time. If any Incident Reviews were required, they have been submitted by the Permit Holder and accepted by BCER. A completed Incident may still be under long-term monitoring.

## Chapter 15 Enter Incident Details

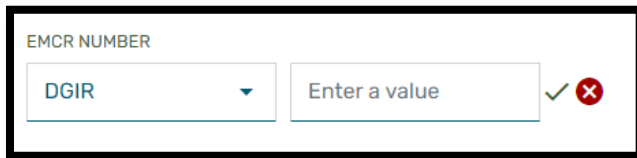
The Incident Details page has the following methods of entering data:

### 15.1 Edit, Save, and Cancel

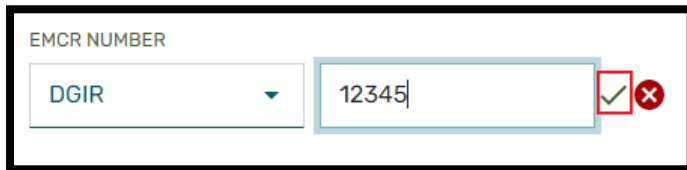
Most fields on the page are in read-only mode by default. They can be activated by clicking on the edit pencil.



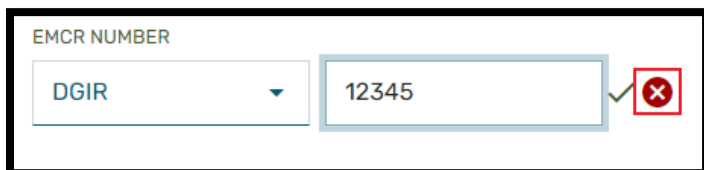
Once the field is active, the user can enter or select the data. (See sections below for different methods of data entry.)



Once the data is entered, click on the green check mark to save the data.



To cancel the data entry or data update, instead click on the red x.

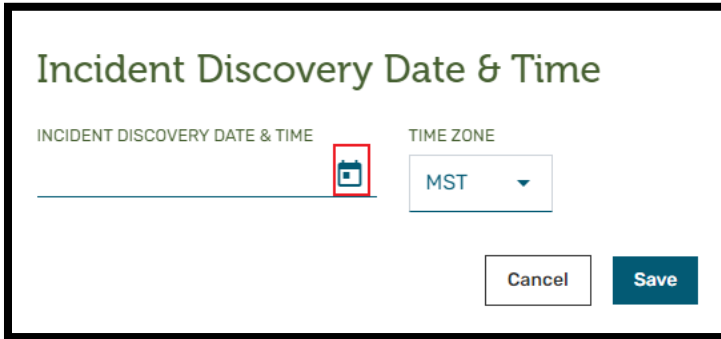


## 15.2 Date & Time Entry

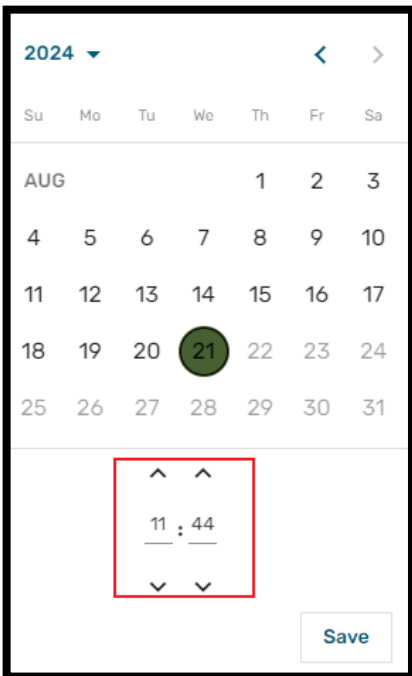
To enter a date and time, first click on the edit pencil to activate the field.



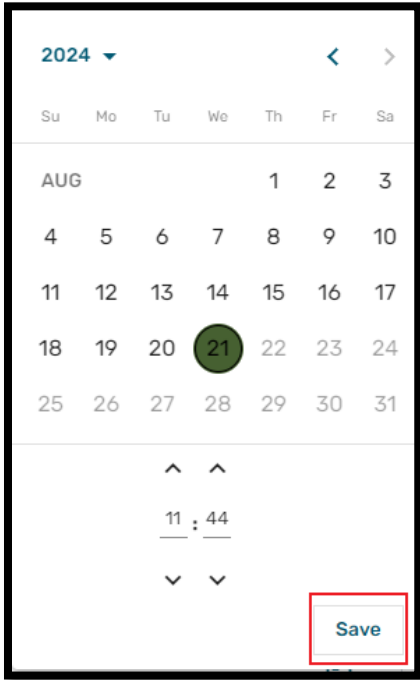
On the pop-up, click on the calendar icon.



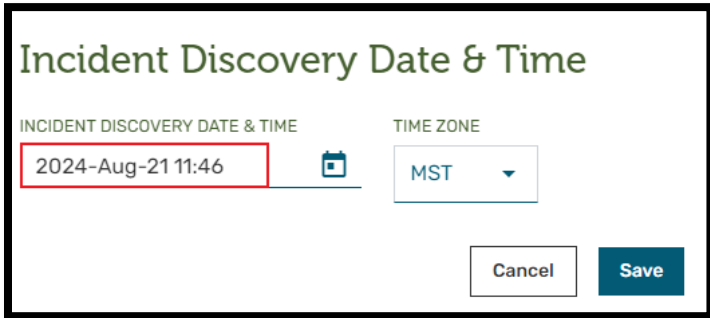
Select the date and the time in a 24-hour clock.



Then click on “Save”.



The date and time selected will be displayed on the pop-up.



Next, select the Time Zone.

NOTE: MST and PST are labels only. CM-IS does not record the time zone, or translate between time zones. Rather, this label is meant to indicate if the time was in Mountain Time or Pacific Time.

After you have entered the Date & Time, click on “Save”.

The Date & Time entered will be displayed on the Incident Details page.

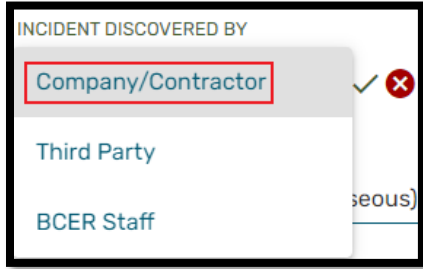
### 15.3 Drop-Down List of Values - Single-Select

The drop-down list of values allows the user to make a single selection from a short list of options.

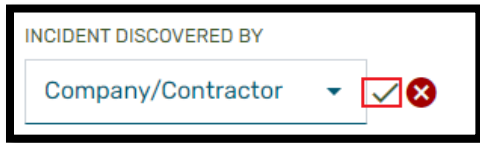
To use the drop-down list, activate the field by clicking on the edit pencil. Note: If using a drop-down list on a pop-up, the field will already be active.

Select the desired value from the drop-down list.

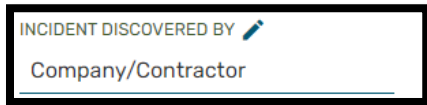




Click the green check mark to save the selection.



The selected value will be displayed.



## 15.4 Drop-Down List of Values - Multi-Select

The multi-select drop-down allows the user to make multiple selections from a short list of options.

To use the multi-select drop-down, activate the field by clicking on the edit pencil. Note: If using a drop-down list on a pop-up, the field will already be active.



Click on the field to bring up the drop-down list.

ENVIRONMENT AFFECTED

✓✗

Select the desired value or values from the drop-down list.  
Click the green check mark to save the selection(s).

ENVIRONMENT AFFECTED

- Wildland
- Agricultural Land
- Developed Land
- Muskeg/Stagnant Water
- Lake

✓✗

The selected value(s) will be displayed.

ENVIRONMENT AFFECTED ✎

Agricultural Land, Developed Land

Note: If there are more values than can be displayed on the page, the user can hover their mouse over the field to see the full list of selected values.

ENVIRONMENT AFFECTED ✎

Wildland, Agricultural Land, Developed Land, Muskeg/...

CONFINED LEA

INITIAL SOLID

Wildland, Agricultural Land, Developed Land, Muskeg/Stagnant Water, Lake

## 15.5 Text or Number Entry Field – Short Entry Form

The text or number entry fields allow the user to free-form enter text and/or numbers, depending on the data that is being entered.

To use a text or number entry field, click on the edit pencil to activate the field.

INITIAL SOLID OR LIQUID SPILL VOLUME

Note: If entering data into a text or number entry field on a pop-up, the field will already be active.

Type the text or number into the field.

Note: Some fields only allow for numbers to be entered, while other fields allow letters, numbers, and special characters such as “&”.

INITIAL GASEOUS SPILL VOLUME

Enter a value m<sup>3</sup> ✓ ✕

Click on the green check mark to save the data.

INITIAL GASEOUS SPILL VOLUME

500 m<sup>3</sup> ✓ ✕

The data entered will be displayed.


INITIAL GASEOUS SPILL VOLUME

500 m<sup>3</sup>

## 15.6 Text Entry Field - Long Entry Form

The long form text entry boxes allow the user to enter up to 4,000 characters. They also allow the user to add formatting to the text (bold, italics, underline), add links, and add bulleted or numbered lists.

To use a long form text entry field, first click on the edit pencil to activate the field.

INCIDENT DESCRIPTION 

*Description of the Incident, including all the details required for the initial communication email.*

Type the desired text into the text box.

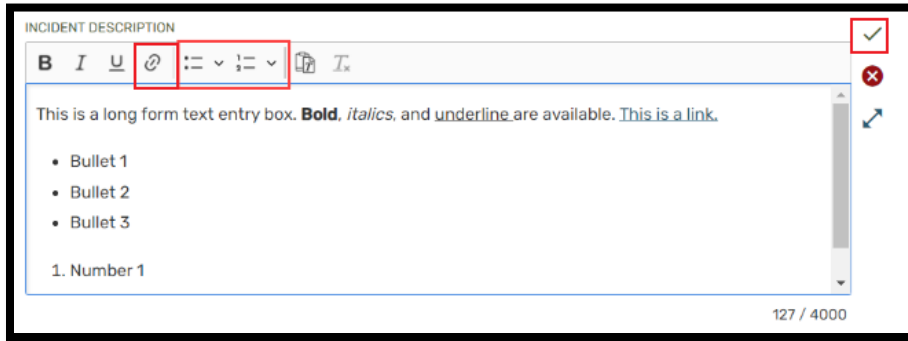
INCIDENT DESCRIPTION

**B** *I* U     

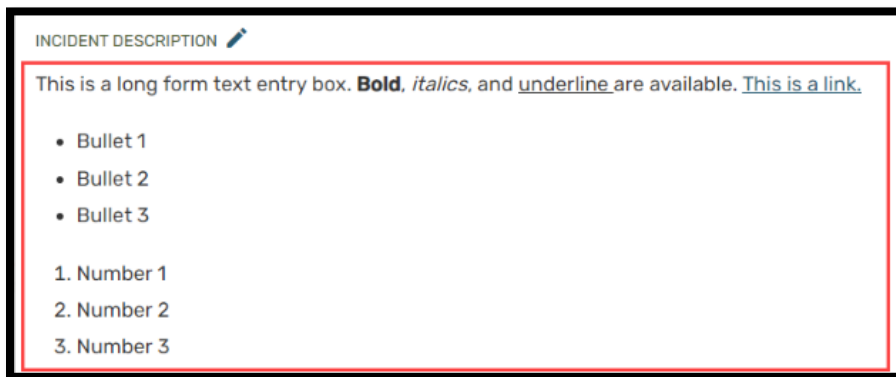
0 / 4000

To make the take bold, italics, or underlines, click the associated button at the top of the long form text box. To create a bulleted list or numbered list, click either the bullet list or number list icons.

Save the entered text by clicking on the green check mark.



The entered text will be displayed as formatted.



## 15.7 + Add Functionality

The Incident reporter (user creating the Incident) will be added as the default contact type – Reporter in the Contact list under Incident details section and cannot be edited. To add more contacts + functionality is used to add one or more records.

To use the + functionality, click on the + icon.

CONTACTS					
+ Add Contact					
CONTACT TYPE	NAME	COMPANY	PRIMARY PH #	SECONDARY PH #	EMAIL
Reporter	Avil Agent		111-111-1111		Kermit.Notices@bc-er.ca

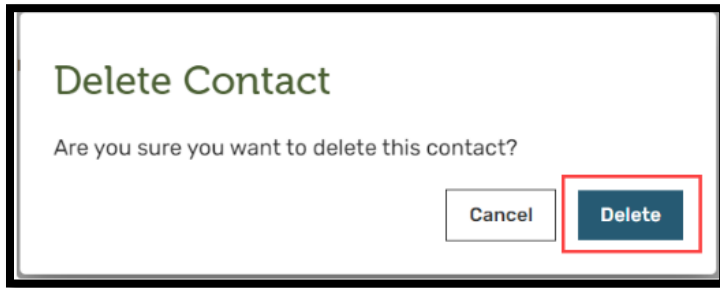
The user will be presented with fields related to whatever type of record they are adding. In the case of adding a Contact, the user will be presented with the Add Contact pop-up.

The record will be displayed on the page.

To edit the record, click on the edit pencil. To add another record, click on the + icon again.

CONTACT TYPE	NAME	COMPANY	PRIMARY PH #	SECONDARY PH #	EMAIL
Reporter	Avil Agent	Something	111-111-1111		Kermit.Notices@bc-er.ca
Primary Contact	Joe Bill	Something	111-111-1111		Jeo.Bill@hello.com

To Delete the record, click on Trash can icon.

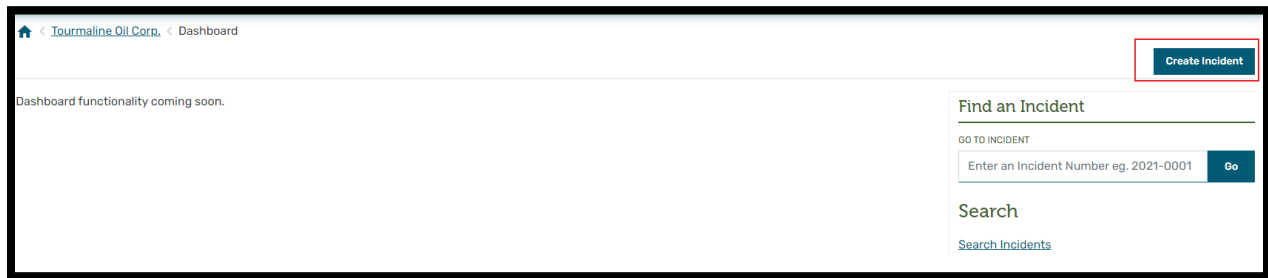


## Chapter 16 Create, Submit and Cancel a Minor Incident

Permit Holder Application portal allows to enter a Minor incident only. Although Leveled Incidents associated to the Permit Holder will be viewable from the Advanced Incident Search page.

### 16.1 Create a New Minor Incident

To create a new Minor Incident, from the Incident Dashboard, click on “Create Incident”.



This will create a new Draft Incident.

### 16.2 Complete Required Information

For information on entering data, see [Enter Incident Details](#) section.

The following information required to submit a Minor Incident:

- Incident Discovery Date & Time
- Location
  - Activity Type
  - One of the following sets of coordinates:
    - NTS/DLS coordinates
    - GPS coordinates
    - UTM coordinates
- Incident Description



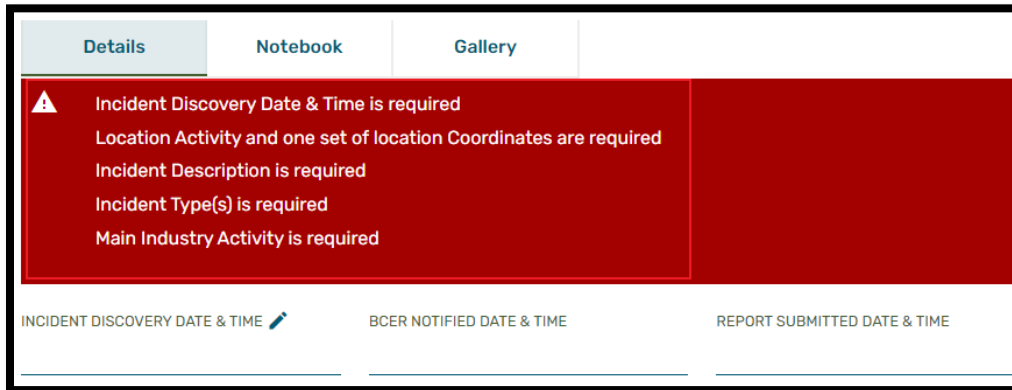
- Incident Type(s)
- Main & Secondary Industry Activities
- Material Information *(only if Incident is a Spill)*
- Environment Affected *(only if Incident is a Spill)*
- Land Classification *(only if Incident is a Spill)*
- Confined to Lease or Right of Way *(only if Incident is a Spill)*
- Unknown *(only if Incident is a Spill and Confined to Lease or Right of Way is unknown)*
- Initial Solid & Liquid Spill Volume *(only if Incident is a Solid or Liquid Spill)*
- Initial Gaseous Spill Volume *(only if Incident is a Gaseous Spill)*

### 16.3 Submit a Minor Incident

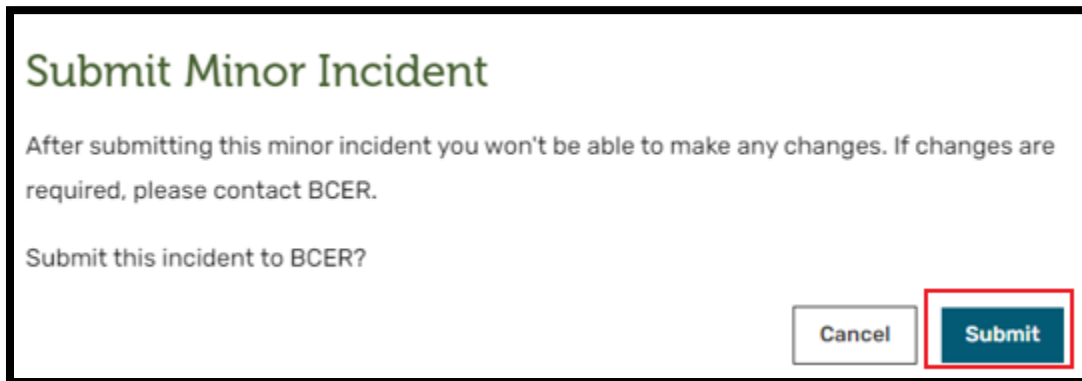
Once the information has been filled out on the Incident Details page, scroll to the bottom of the page and click on “Submit”.

The screenshot shows a form with the following fields and values:

INITIAL SOLID OR LIQUID SPILL VOLUME	INITIAL GASEOUS SPILL VOLUME
12 Litres	22 m <sup>3</sup>
OTHER IMPACTS	
Equipment Loss <\$50,000    Equipment Loss Description    Loss value	
CONTRACTORS OR THIRD PARTIES DIRECTLY INVOLVED	
None	
<b>Submit</b>	



If any required information is missing, it will be displayed at the top of the page in a red error notification box.



Complete the required information, then click on “Submit” again.

### 16.3.1 Incident Status Change to “Submitted”

After the Minor Incident is successfully submitted, it will be assigned an Incident number and its status will be changed to “Submitted”. The Incident's status can be seen at the top of the Incident Details, after the Permit Holder name.

Incident #2024-0129: Tourmaline Oil Corp. [Submitted]

Details Notebook Gallery

INCIDENT DISCOVERY DATE & TIME	BCER NOTIFIED DATE & TIME	REPORT SUBMITTED DATE & TIME
2024-Aug-21 11:46 MST	2024-Aug-21 14:21 MST	2024-Aug-21 14:21 MST

When submitted, the system will send an automated email to the BCER Staff for the Incident submitted and will be ready for their review in the BCER CMIS – Incidents module.

## 16.4 Cancel Incident on the Incident Details Page

To cancel an Incident, on the Incident Details page, click on “Cancel Incident” in the upper right corner.

Incident #: Tourmaline Oil Corp. [Draft]

Details Notebook Gallery

INCIDENT DISCOVERY DATE & TIME BCER NOTIFIED DATE & TIME REPORT SUBMITTED DATE & TIME EMCR NUMBER

LEVEL  
Minor

Cancel Incident

NOTE: If there are any fields in edit mode, the “Cancel Incident” button is disabled. Save all data on the page by clicking on the green check marks, then try again.

Incident #: Tourmaline Oil Corp. [Draft]

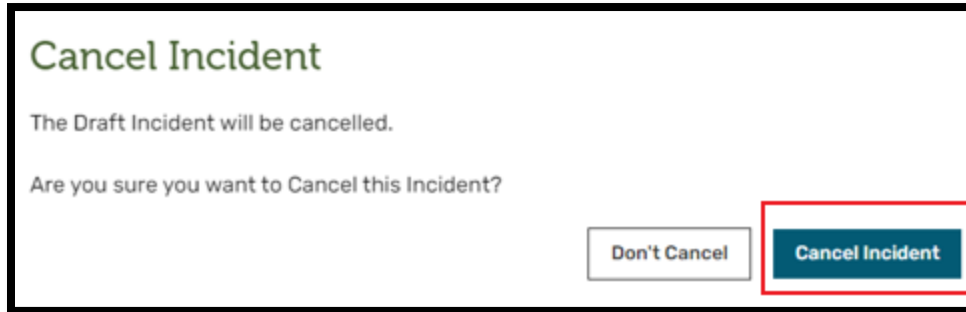
Details Notebook Gallery

INCIDENT DISCOVERY DATE & TIME BCER NOTIFIED DATE & TIME REPORT SUBMITTED DATE & TIME EMCR NUMBER

EMCR NUMBER  
Select a value 2 ✓✗

Cancel Incident

User can cancel an incident only when it is in Draft Status, the system will present a pop-up asking the user if they are sure they wish to cancel the Incident. Click on “Cancel Incident” to proceed.



The Incident will be cancelled.

NOTE: Cancelled Draft Incidents are deleted and cannot be retrieved or viewed once cancelled.

## Chapter 17 Incident Notebook and Gallery Tab

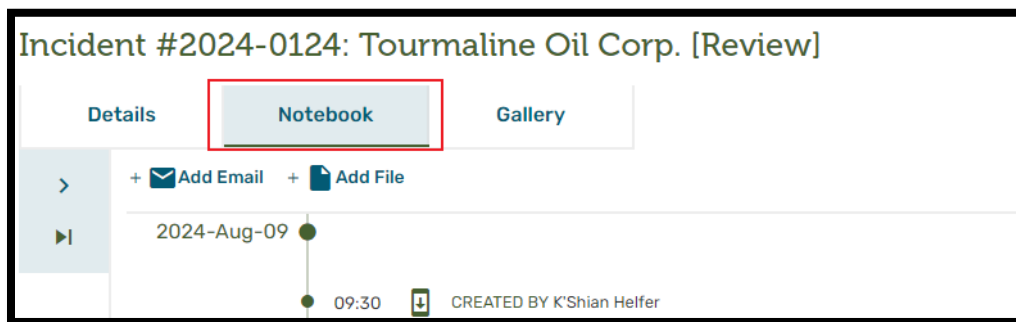
### 17.1 Incident Notebook:

The Incident Notebook is the location to store files, photos, emails, and notes about the Incident. Each Incident has its own Notebook.

It also indicates the changes made to the incident and by which user. It also indicates the status of the incident.

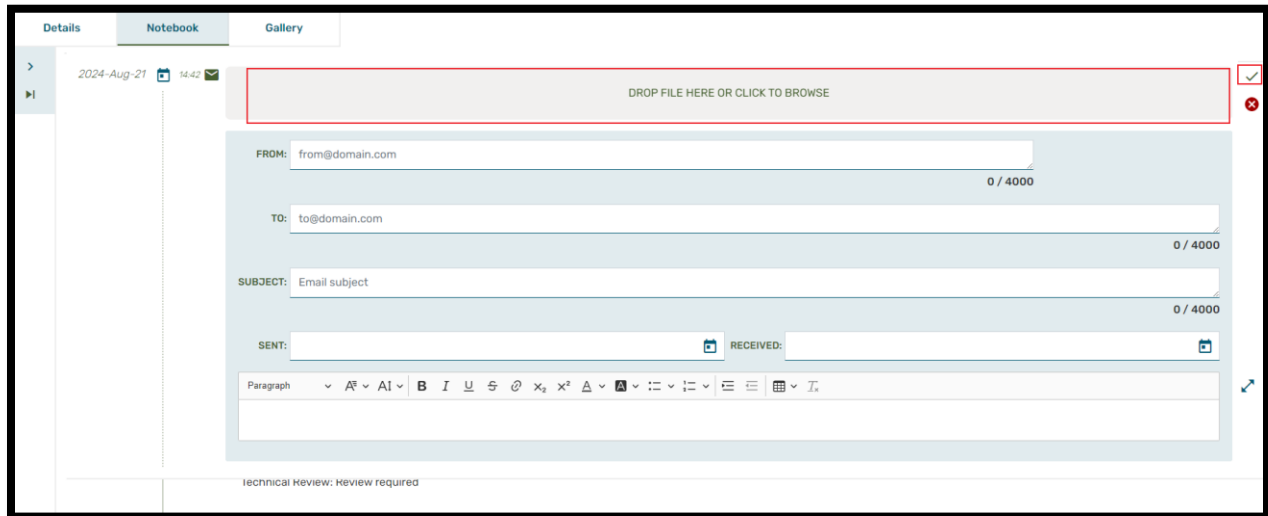
**NOTE:** Users can upload documents to the Notebook in any Incident Status including Completed Status.

To get to an Incident's Notebook, click on the “Notebook” tab:



#### 17.1.1 Emails

Emails can be added directly by dragging them to the grey box.



## 17.1.2 Files

A variety of file types can be added to the Notebook, including (but not limited to):

- Photos
- Word documents
- PDF documents
- Mapping files
- Zipped folders

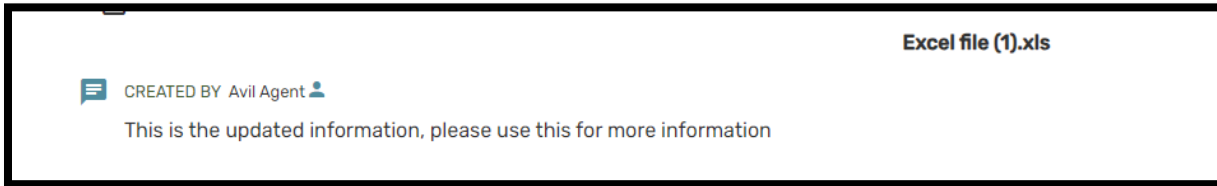
## 17.1.3 Annotations

It is also possible to add an annotation to anything that has uploaded to the Notebook.

To do so, hover over the + symbol at the bottom of any internal note, file, or email:



Annotations will be displayed below the internal note, email, or file:

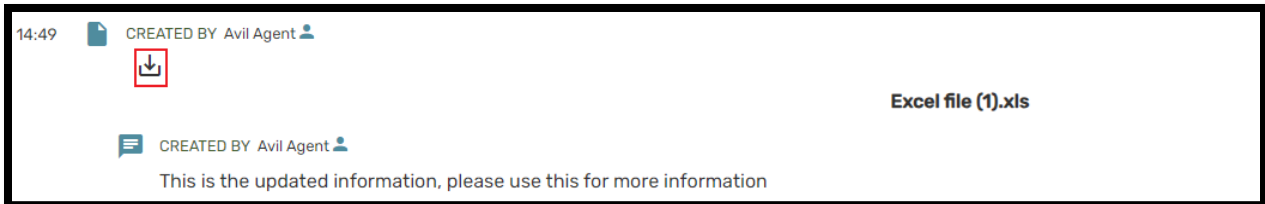


It is also possible to attach emails or files to existing internal notes, emails, or files in the Notebook.

Once uploaded, you will not be able to edit or delete an entry, for updates, just upload the latest document and add a note to it for more clarification.

### 17.1.4 Downloading Files and Emails

A file or email can be downloaded from the Notebook by clicking on the associated download icon:



### 17.1.5 Indicators

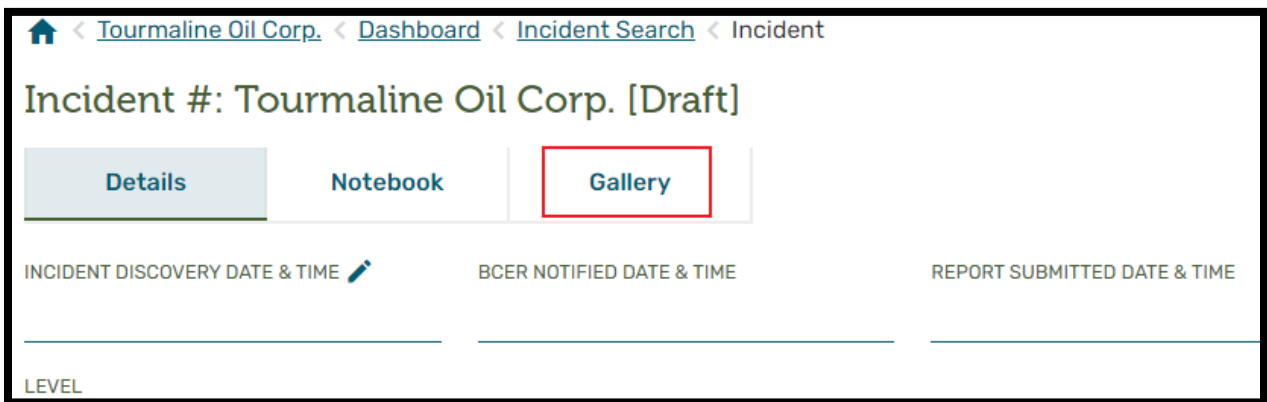
If one or more files or emails have been uploaded to the Notebook, this will be indicated by a paper clip icon on the Notebook tab's header:



## 17.2 Incident Gallery

The Incident Gallery displays thumbnails of any images that were uploaded to the Notebook.

To get to an Incident's Gallery, click on the “Gallery” tab:



### 17.2.1 Viewing a Full-Size Image and Indicator

To expand an image's thumbnail into a larger image, click anywhere on the image:





If one or more images have been uploaded to the Notebook and thus are visible in the Gallery, this will be indicated by a paper clip icon on the Gallery tab's header.

Click on the  to close the image.

## 17.2.2 Downloading an Image

To download an image, click on the download icon:









Incident #2024-0124: Tourmaline Oil Corp. [Review]







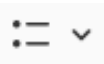

Details    Notebook    **Gallery**

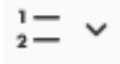
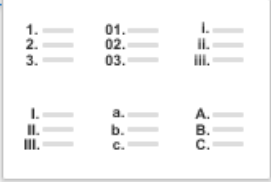

















↓












## Appendix A: Icons and Symbols

Symbol or Icon	Description
	Clicking the red circle with an 'X' in the centre, will cancel the current operation.
	Clicking the 'checkmark' will save the information in the current operation.
	Clicking the outward pointing, double-ended arrow will expand and pop out a text box.
	Clicking the inward pointing, double-ended arrows will collapse the popped-out text box.
	Clicking the pencil will allow editing of the information.
	Clicking the right-handed chevron will expand the panel to the right.
	Clicking the left-handed chevron will collapse the panel to the left.
	Clicking the down arrow in a box, will start the associated file to be downloaded.

Symbol or Icon	Description
	Clicking the garbage can will perform a delete action on the associated file or information.
	Clicking on the six-dot panel will allow a block of information to be drag & dropped to a new location.
	Clicking on the copy icon allows a block of information to be pasted to the desktop clipboard
	Clicking on this rich-text editor icon will format all highlighted text as bold.
	Clicking on this rich-text editor icon will format all highlighted text as italicized.
	Clicking on this rich-text editor icon will format all highlighted text as underlined.
	Clicking on this rich-text editor icon will insert a bulleted list. Clicking the down arrow displays style options. <div style="text-align: center; margin-top: 10px;">  </div>

Symbol or Icon	Description
	<p>Clicking on this rich-text editor icon will insert a numbered list. Clicking the down arrow displays style options.</p> 
	<p>Clicking on this rich-text editor icon will toggle removing any formatting of pasted text.</p>
	<p>Clicking on this rich-text editor icon will remove any formatting from the highlighted text.</p>
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is against an Oil &amp; Gas Activity or Special Project Order, rather than a Permit or the Permit Holder.</p>
	<p>Non-Compliance Information Icon: Indicates the reason the Non-Compliance was created.</p>
	<p>Non-Compliance Information Icon: Indicates the Legislation that is being enforced against the Non-Compliance.</p>
	<p>Non-Compliance Information Icon: Indicates the location of the Non-Compliance.</p>

Symbol or Icon	Description
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is against a Permit, rather than an Activity, Special Project Order, or the Permit Holder.</p>
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is against the Permit Holder, rather than an Activity, Permit, or Special Project Order.</p>
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is Overdue</p>
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is due within 7 days</p>
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is due more than 6 days out</p>
	<p>Non-Compliance Information Icon: Indicates that the Non-Compliance is Complete</p>
	<p>Non-Compliance Submission Information Icon: Indicates the presence of a Non-Compliance Submission when a Non-Compliance Submission has been created.</p>
	<p>Non-Compliance Submission Information Icon: Indicates the type of Non-Compliance Submission that has been created.</p>
	<p>Non-Compliance Submission Information Icon: Indicates that a Non-Compliance Submission is pending an answer from the BCER.</p>

Symbol or Icon	Description
	Non-Compliance Search Screen: Clicking on the Filter icon allows for entering information to filter the contents of the column.
	Non-Compliance Search Screen: Clicking on this sort icon will sort the information in the column in ascending (smallest to largest) order.
	Non-Compliance Search Screen: Clicking on this sort icon will sort the information in the column in descending (largest to smallest) order.
	Non-Compliance and Submission Notebook tabs indicating that there are attachments.
	Non-Compliance and Submission Notebook Information Icon: Indicates that there is a File attachment entry
	Non-Compliance and Submission Notebook Information Icon: Indicates that there is an email attachment entry
	Non-Compliance and Submission Notebook Information Icon: Indicates that there is an annotation entry
	Non-Compliance and Submission Notebook Information Icon: Indicates that there is a status change entry
	Inspection Inventory Icon: Indicates Non-Compliances on the Inspection Inventory Item
	Inspection Inventory Icon: Indicates to display all information for each Inspection Inventory Item in the Activity Type.
	Inspection Inventory Icon: Indicates to display minimal information for each Inspection Inventory Item in the Activity Type.

## Appendix B: Notifications with PDF Letter Attachments

The Permit Holder can potentially receive five types of generic email notifications with PDF attachments. The emails have the following subject lines and PDF attachments:

- Non-Compliance emails:
  - BCER CM-IS Notification: Non-Compliance Notice <Notice Number> Issued <Permit Holder Name>
    - <Non-Compliance Notice Number> Non-Compliance Notice Issued.pdf
  - BCER CM-IS Notification: Non-Compliance <Non-Compliance Number> Reminder <Permit Holder Name>
    - <Non-Compliance Notice Number> Non-Compliance Notice Reminder.pdf
  - BCER CM-IS Notification: Non-Compliance Notice <Notice Number> Completed <Permit Holder Name>
    - <Non-Compliance Notice Number> Non-Compliance Notice Completed.pdf
  - BCER CM-IS Notification: Non-Compliance Notice <Notice Number> Escalated <Permit Holder Name>
    - <Non-Compliance Notice Number> Non-Compliance Notice Escalated.pdf
  -
- Inspection emails:
  - BCER CM-IS Notification: In Compliance Inspection Report <Inspection Number> - <Permit Holder Name>
    - <Inspection Number> Inspection Report.pdf
  - BCER CM-IS Notification: Inspection Report <Inspection Number> & Non-Compliance Notice <Non-Compliance Notice Number> Issued - <Permit Holder Name>
    - <Inspection Number> Inspection Report.pdf
    - <Non-Compliance Notice Number> Non-Compliance Notice Issued.pdf

The Permit Holder can also login to the CM-IS Permit Holder Application (link is provided in the email) and review the Non-Compliance Notice or Inspection information to determine any follow-up actions needed.

The reasons that the Permit Holder could potentially receive these notifications are:

- A Non-Compliance Notice has been Issued to the Permit Holder
- The Permit Holder has a Non-Compliance that has exceeded the Correction Due Date for the first-time.
- The BCER is satisfied that a Non-Compliance has been addressed
- The BCER has escalated a Non-Compliance for enforcement actions



- An Inspection has been Completed for the Permit Holder

## Appendix C: Notifications without PDF Attachments

The Permit Holder can potentially receive two types of generic email notifications:

- Non-Compliance update
- Non-Compliance Submission update

### Non-Compliance Update

Whenever there is an important update to a Non-Compliance, the Permit Holder will receive a generic email notification with the subject line:

- BCER CM-IS Notification: Non-Compliance <Non-Compliance Number> - <Permit Holder Name>  
E.g., BCER CM-IS Notification: Non-Compliance 2022-0123-01 – Canadian Oil Company

The Permit Holder needs to login to the CM-IS Permit Holder Application (link is provided in the email) and review the Non-Compliance to determine any follow-up actions needed.

The reasons that the Permit Holder could potentially receive a Non-Compliance notification are:

- The BCER has made a decision to retract an issued Non-Compliance.
- The BCER has answered the 'Respond to Non-Compliance' and is satisfied that the Non-Compliance has been corrected

### Submission Update

Whenever there is an important update to a Non-Compliance Submission, the Permit Holder will receive a generic email notification with the subject line:

- BCER CM-IS Notification: Non-Compliance Submission <Non-Compliance Submission Number>  
E.g., BCER CM-IS Notification: Non-Compliance Submission 2022-0123-01-001

The Permit Holder needs to login to the CM-IS Permit Holder Application (link is provided in the email) and review the Non-Compliance Submission to determine any follow-up actions needed.

The reasons that the Permit Holder could potentially receive a Non-Compliance Submission notification are:

- The BCER has provided an answer for a 'Request for Clarification'
- The BCER has either 'Granted' or 'Denied' a 'Request for Extension'

- The BCER answered the 'Respond to Non-Compliance' and concluded that it requires additional information before it can mark a Non-Compliance as 'Satisfied'