Ontario Energy Board | Commission de l'énergie de l'Ontario

RRR FILING GUIDE

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

PREPARED BY OEB STAFF

Updated

March 20, 2026

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1. Purpose

RRR Filing Guide

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

Pivotal UX System

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

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

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

2. Location of RRR Information

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

Highlights of the RRR webpage include:

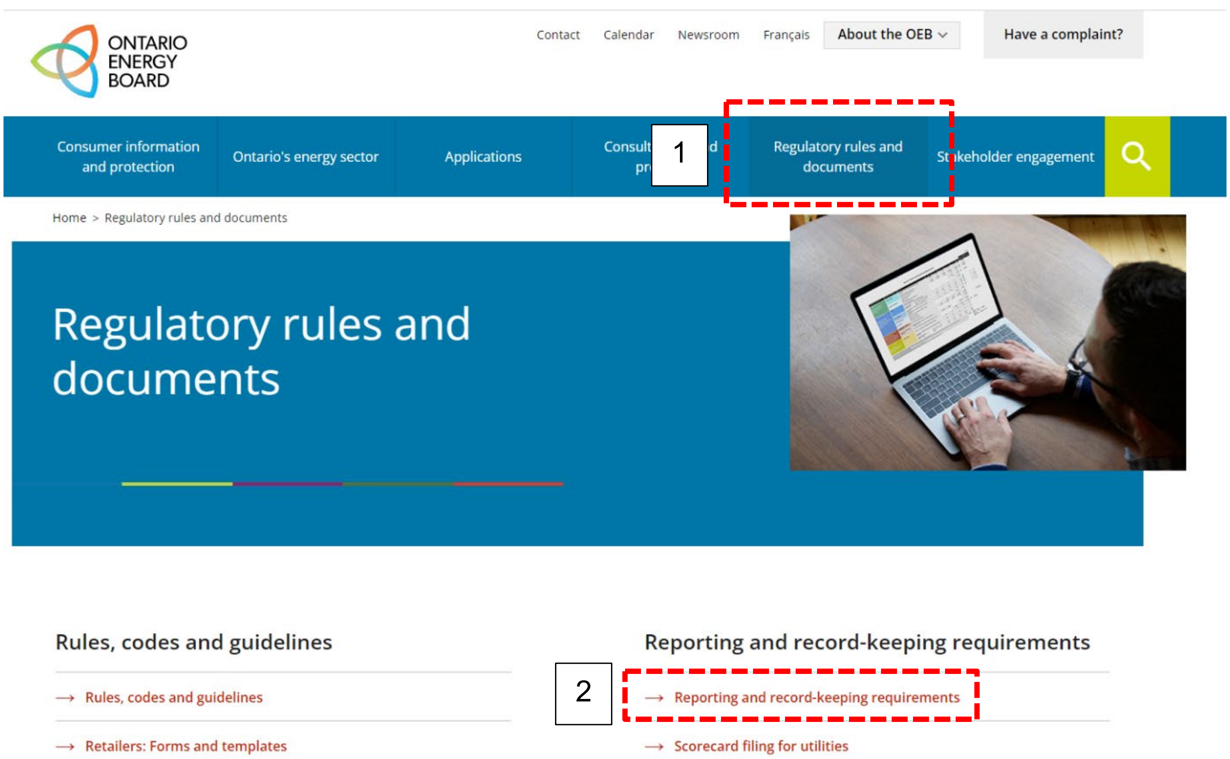
RRR – This webpage contains current documents and recent communications from the OEB regarding RRR.

RRR Filing System – The link to the RRR filing portal is found on this page.

Reporting Schedule – This section contains the filing schedule and countdown for impending filing deadlines for regulated entities.

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

3. Registration



Registered User Privileges

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

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

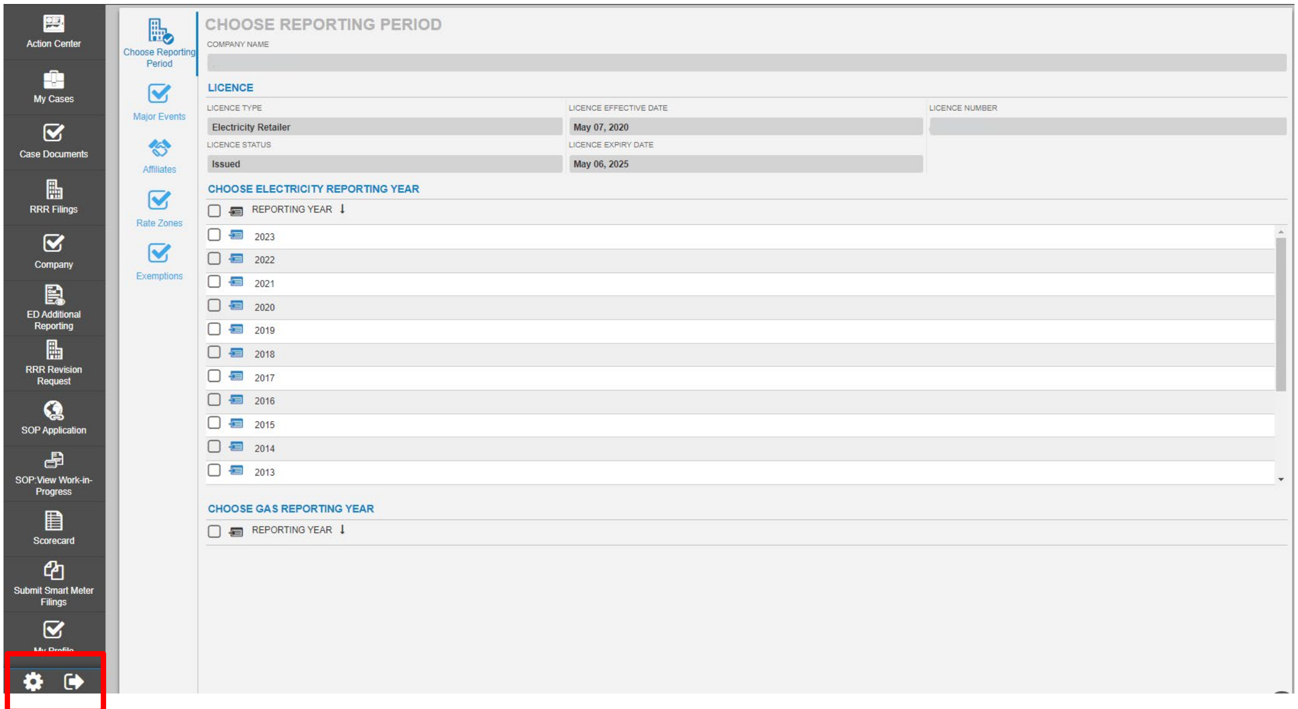
If you have forgotten your user ID and password, click on "Forgot your Password" on the RRR Filing System's log-in webpage. You will be asked to provide your email address registered with the OEB. Your user ID and password will be sent to your inbox immediately.

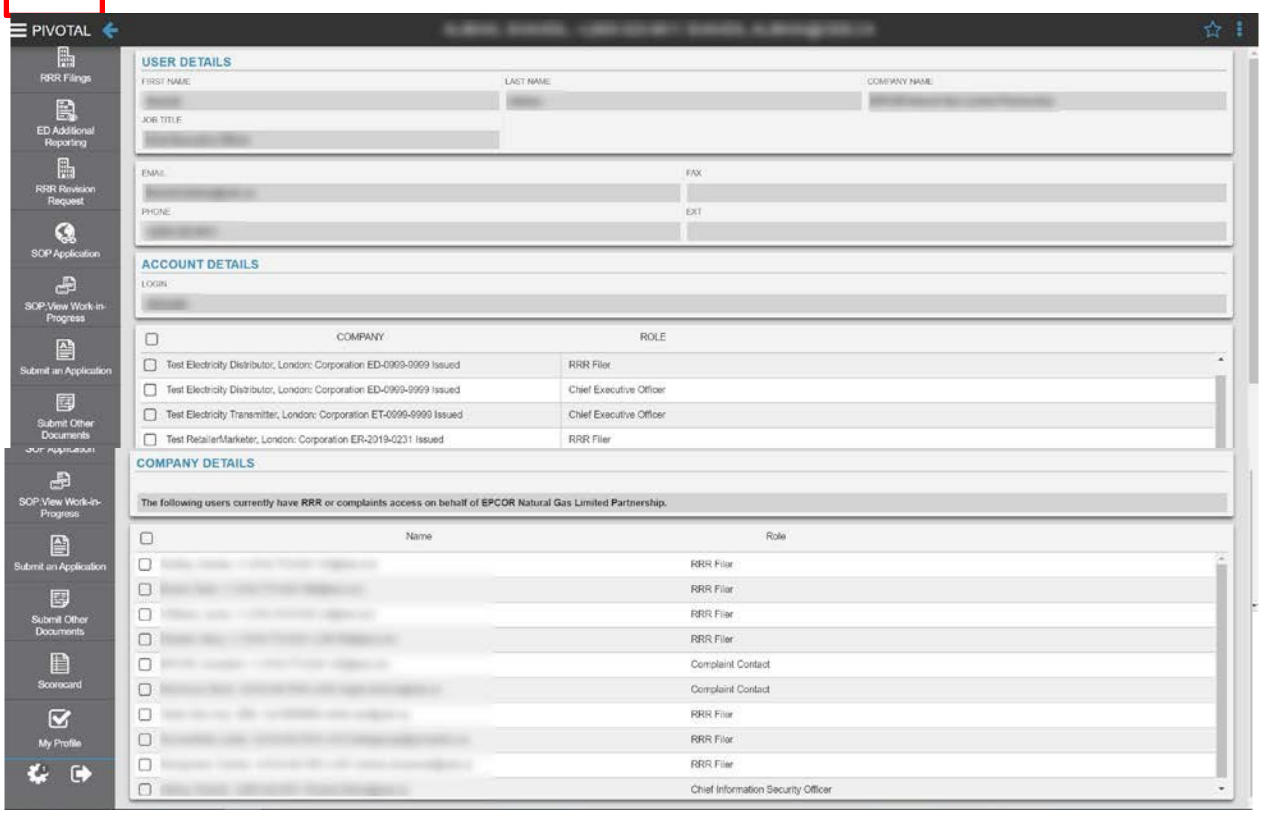
Removing or Adding a Registered User

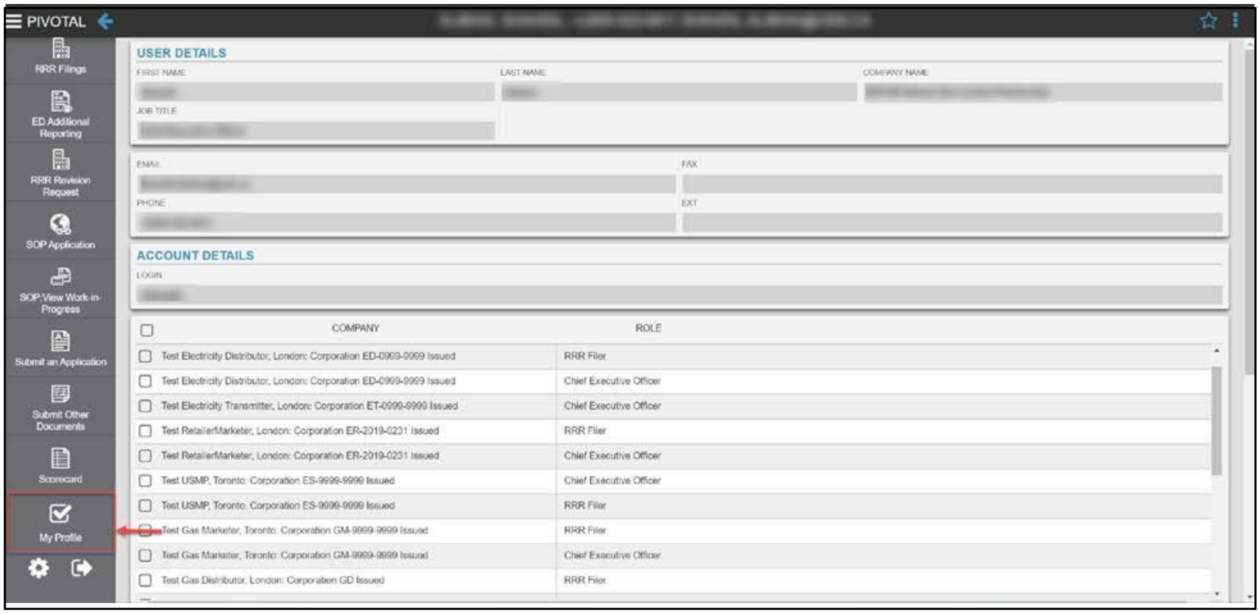
When the job function of a registered user changes, or when an employee leaves the organization, the OEB should be informed so that the RRR log-in ID assigned to the person can be cancelled. In order to assist users on the various ID's for a distributor, the RRR Filing System includes a "My Profile"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

To remove or add a RRR user, the primary regulatory contact should complete the "Electronic User Form" found on the Filing systems page of the OEB website and email to registrar@oeb.ca.

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


Action Center
My Cases
Case Documents
RRR Filings
Company
ED Additional Reporting
RRR Revision Request
SOP Application
SOP:View Work-in-Progress
Scorecard
Submit Smart Meter Filings
Choose Reporting Period
Major Events
Affiliates
Rate Zones
Exemptions
CHOOSE REPORTING PERIOD
COMPANY NAME
LICENCE
LICENCE TYPE
Electricity Retailer
LICENCE EFFECTIVE DATE
May 07, 2020
LICENCE NUMBER
LICENCE STATUS
Issued
LICENCE EXPIRY DATE
May 06, 2025
CHOOSE ELECTRICITY REPORTING YEAR
REPORTING YEAR
2023
2022
2021
2020
2019
2018
2017
2016
2015
2014
2013
CHOOSE GAS REPORTING YEAR
REPORTING YEAR


PIVOTAL
RRR Filings
ED Additional Reporting
RRR Revision Request
SOP Application
SOP:View Work-in-Progress
Submit an Application
Submit Other Documents
Scorecard
My Profile
USER DETAILS
FIRST NAME
LAST NAME
COMPANY NAME
JOB TITLE
EMAIL
FAX
PHONE
EXT
ACCOUNT DETAILS
LOGIN
COMPANY
ROLE
Test Electricity Distributor, London: Corporation ED-0999-9999 Issued
RRR Filer
Test Electricity Distributor, London: Corporation ED-0999-9999 Issued
Chief Executive Officer
Test Electricity Transmitter, London: Corporation ET-0999-9999 Issued
Chief Executive Officer
Test RetailerMarketer, London: Corporation ER-2019-0231 Issued
RRR Filer
COMPANY DETAILS
The following users currently have RRR or complaints access on behalf of EPCOR Natural Gas Limited Partnership.
Name
Role
RRR Filer
RRR Filer
RRR Filer
RRR Filer
Complaint Contact
Complaint Contact
RRR Filer
RRR Filer
RRR Filer
Chief Information Security Officer


PIVOTAL
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USER DETAILS
FIRST NAME
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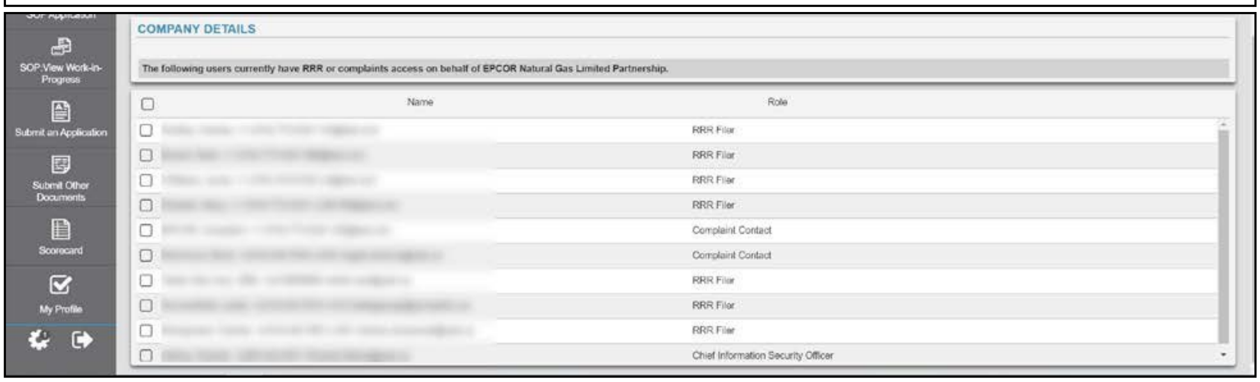
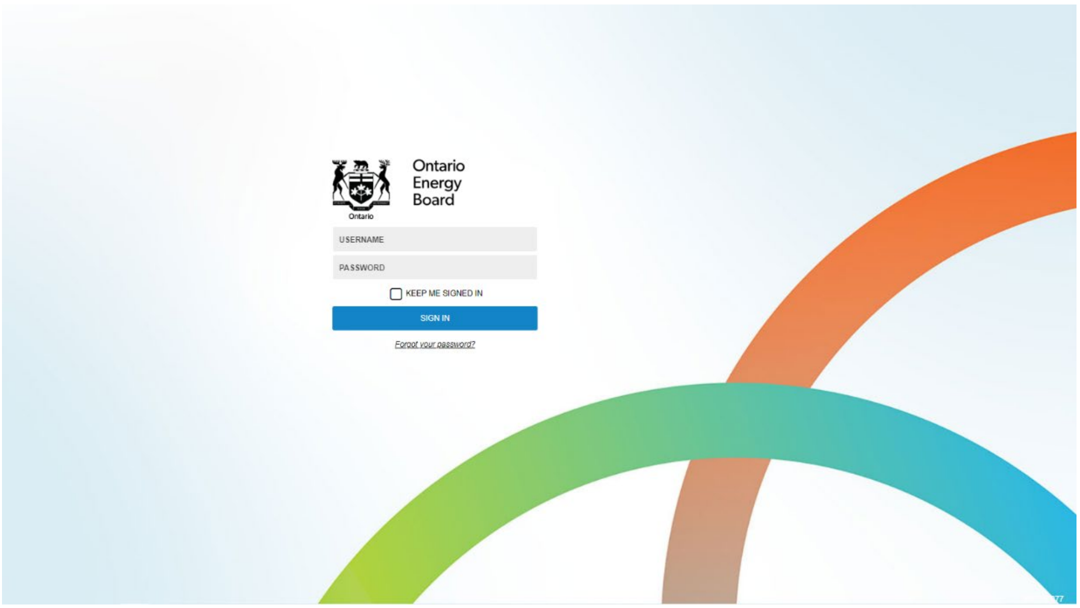
COMPANY NAME
JOB TITLE
EMAIL
FAX
PHONE
EXT
ACCOUNT DETAILS
LOGIN
COMPANY
ROLE
Test Electricity Distributor, London: Corporation ED-0999-9999 Issued
RRR Filer
Test Electricity Distributor, London: Corporation ED-0999-9999 Issued
Chief Executive Officer
Test Electricity Transmitter, London: Corporation ET-0999-9999 Issued
Chief Executive Officer
Test RetailerMarketer, London: Corporation ER-2019-0231 Issued
RRR Filer
Test RetailerMarketer, London: Corporation ER-2019-0231 Issued
Chief Executive Officer
Test USMP, Toronto: Corporation ES-9999-9999 Issued
Chief Executive Officer
Test USMP, Toronto: Corporation ES-9999-9999 Issued
RRR Filer
Test Gas Marketer, Toronto: Corporation GM-9999-9999 Issued
RRR Filer
Test Gas Marketer, Toronto: Corporation GM-9999-9999 Issued
Chief Executive Officer
Test Gas Distributor, London: Corporation GD Issued
RRR Filer


SOP View Work-in-Progress
Submit an Application
Submit Other Documents
Scorecard
My Profile
COMPANY DETAILS
The following users currently have RRR or complaints access on behalf of EPCOR Natural Gas Limited Partnership.
Name
Role
RRR Filer
RRR Filer
RRR Filer
RRR Filer
Complaint Contact
Complaint Contact
RRR Filer
RRR Filer
RRR Filer
Chief Information Security Officer

4. Login and Change Password

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

Figure 1: RRR filing system Login Page



URL

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

Login

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

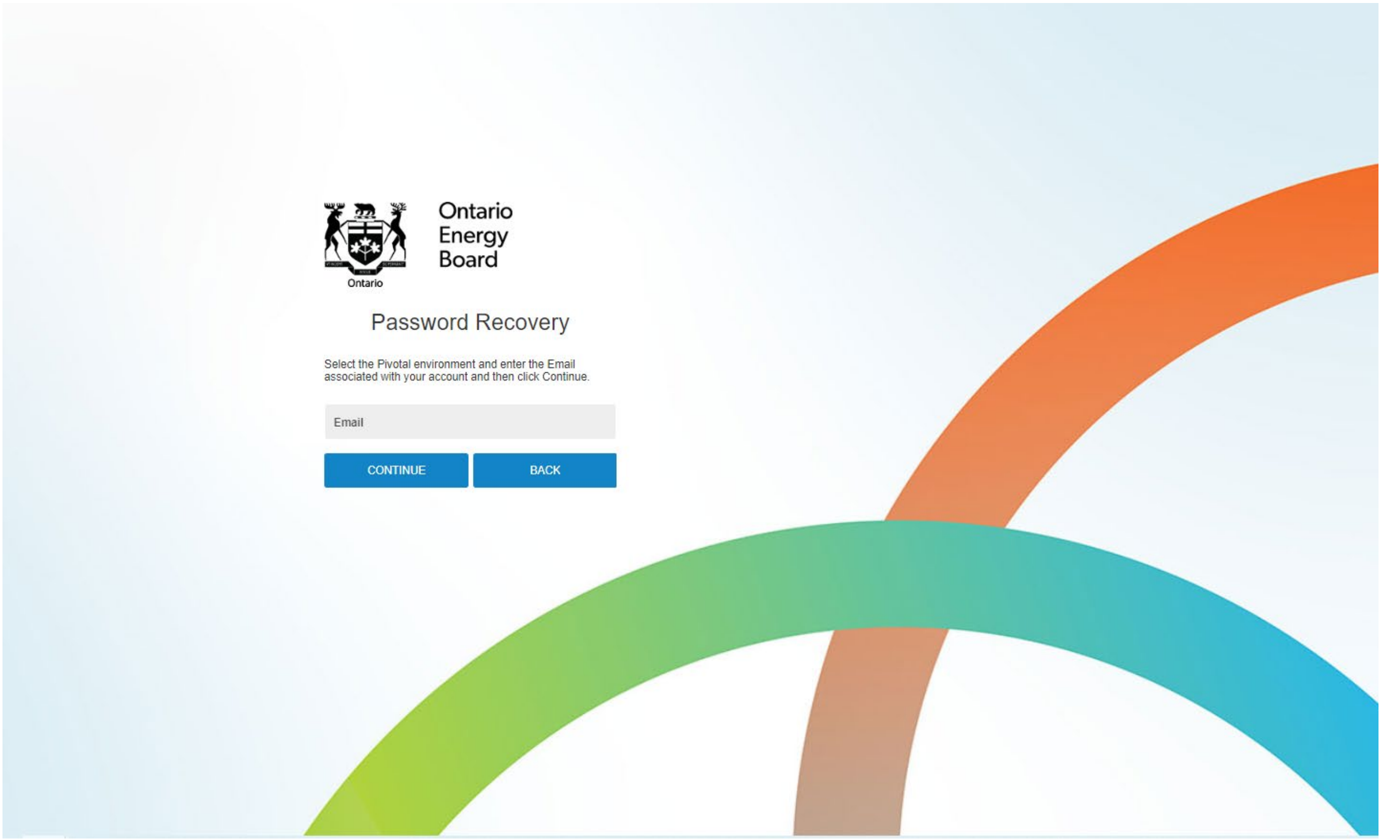
Change Password

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

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

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

Figure 2: Password Recovery Window



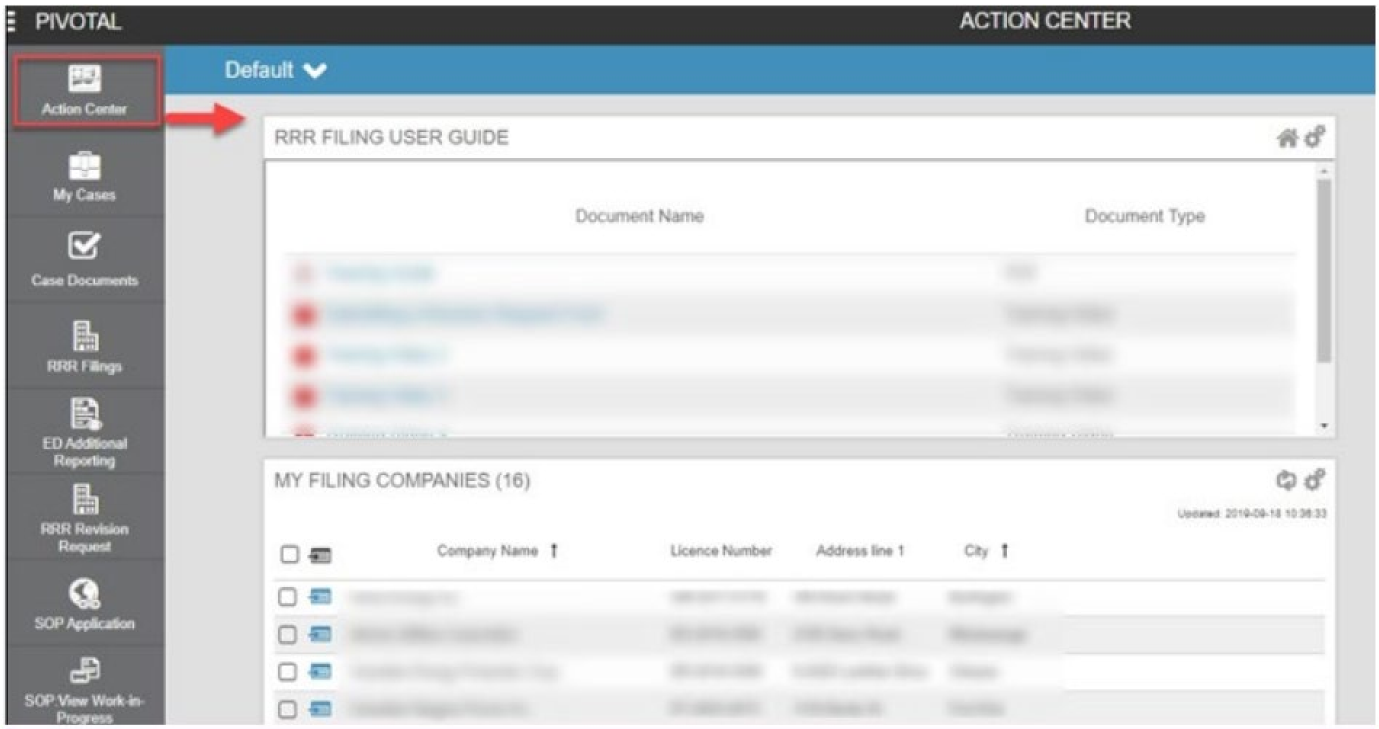
Step 3: An email will then be sent to the registered email address containing more information about how to reset the password. Click on the link and change the password.

5. Action Center

What is Action Center?

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

Figure 3: Action Center



6. RRR Filings Views

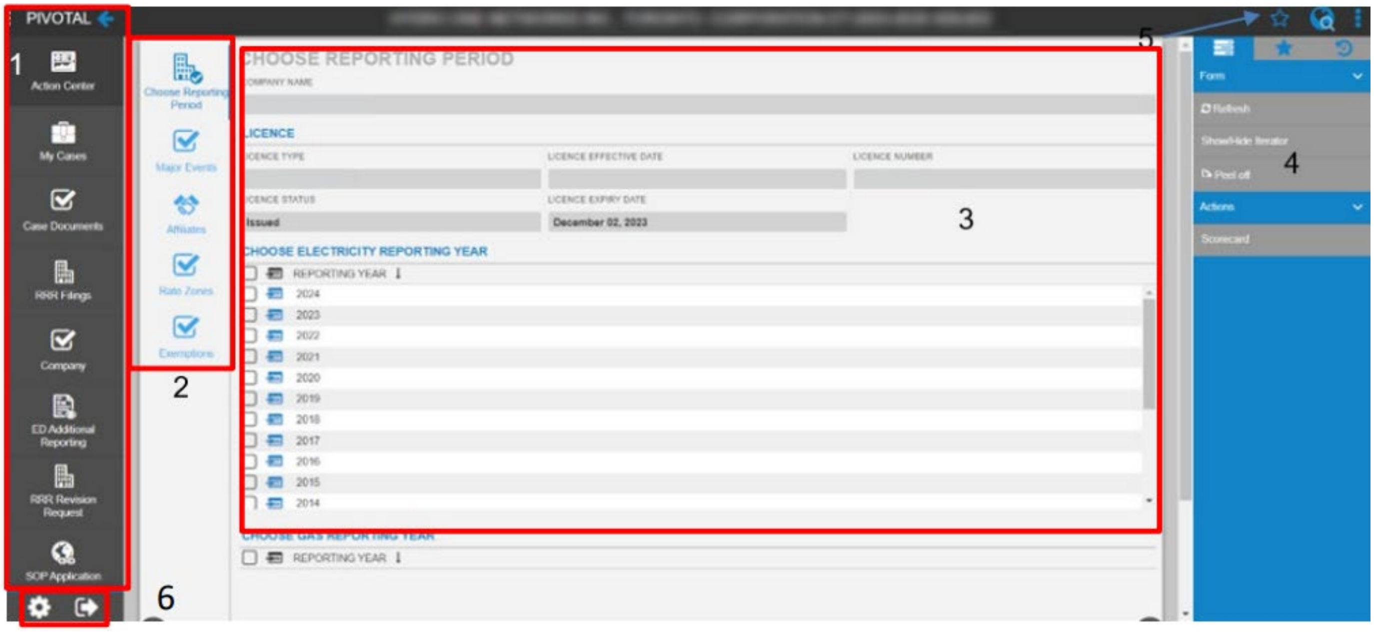
The following section outlines the different views of RRR Filings in RRR filing system.

6.1 Choose Reporting Period

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

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

Figure 4: Choose Reporting Period



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

1. This is navigation bar is present throughout the RRR filings or revision request process. Through this navigation bar users can perform tasks such as RRR filing, RRR revision request, etc. At the top of the navigation bar, there is a feature titled “Action Center”, which allows the users to create a custom dashboard to track any of their RRR data. Additionally, the Action Center also houses demo videos on RRR filing system.

2. This navigation bar features five options: Choose Reporting Period, Major Events, Affiliates, Rate Zones and Exemptions. The options are briefly described below:

   Choose Reporting Period: For accessing RRR forms click on “Choose Reporting Period”. This will then prompt the user to click on the desired RRR Reporting Schedule and finally the annual and quarterly RRR filings. This RRR navigation bar will disappear once the reporting year from the “Choose Reporting Period” is selected.

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

   Affiliates: Clicking on this tab will open affiliate names.

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

3. This displays the selected company's information and lists reporting years. Select "Choose Electricity Reporting Year" for accessing RRR forms. For example, select 2023 as Reporting Year for entering annual 2022 data.

4. This menu bar is present throughout the RRR filings or revisions request process. Through this menu bar users can perform tasks such as Add group, Form refresh and Form print.

5. This header is present throughout the RRR filing or revision request process but will reflect the title of the current layout with information such as distributor name, type, filing year and form status. Notice that on the right-hand side of the header there is "Add Favorite" and "Menu" option, whereas, on the left-hand side there is "Navigation" and "Back arrow" option.

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

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

6.2 RRR Reporting Schedule

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

Figure 5: RRR Reporting Schedule – ET

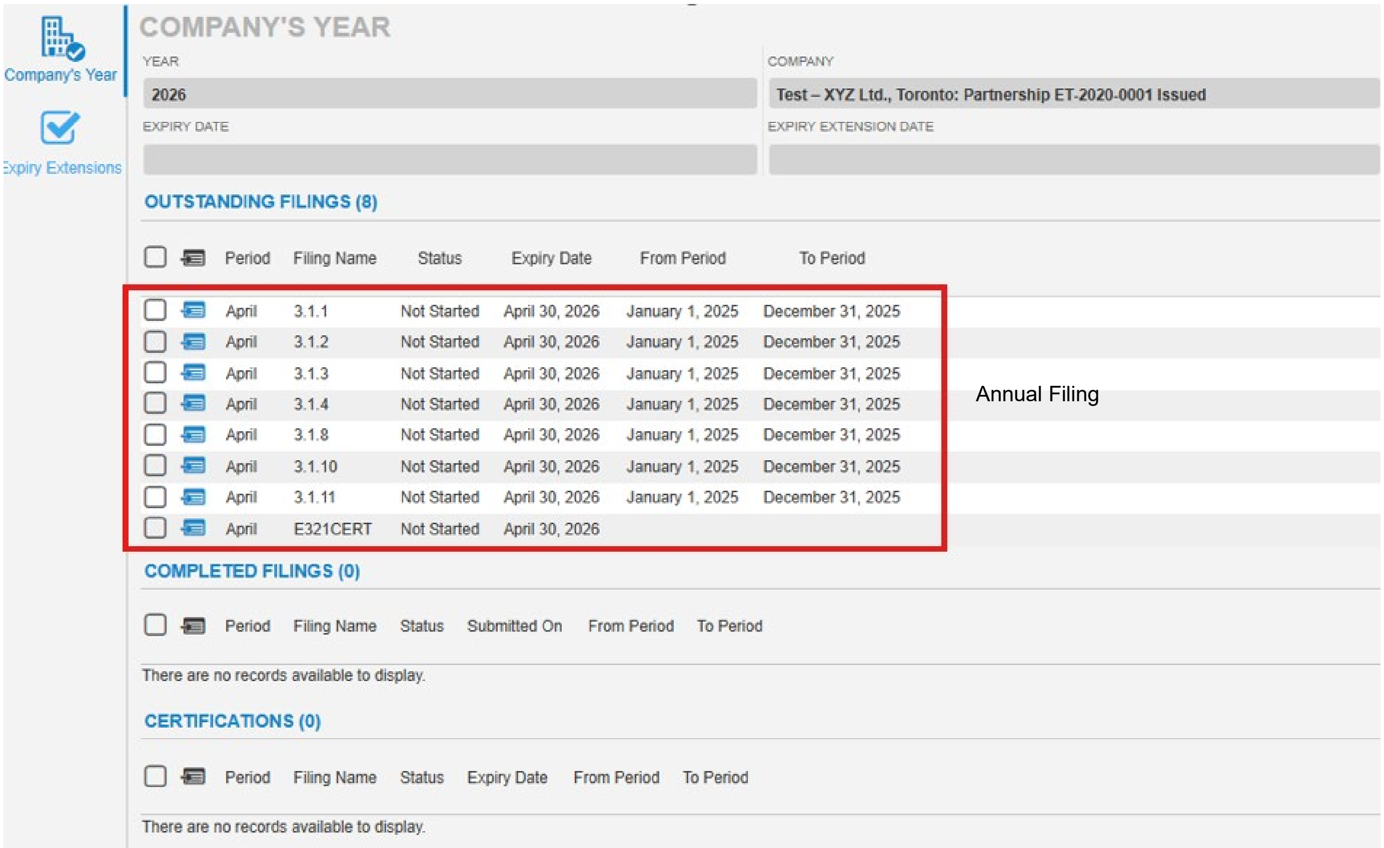


Figure 6: RRR Reporting Schedule – USMP

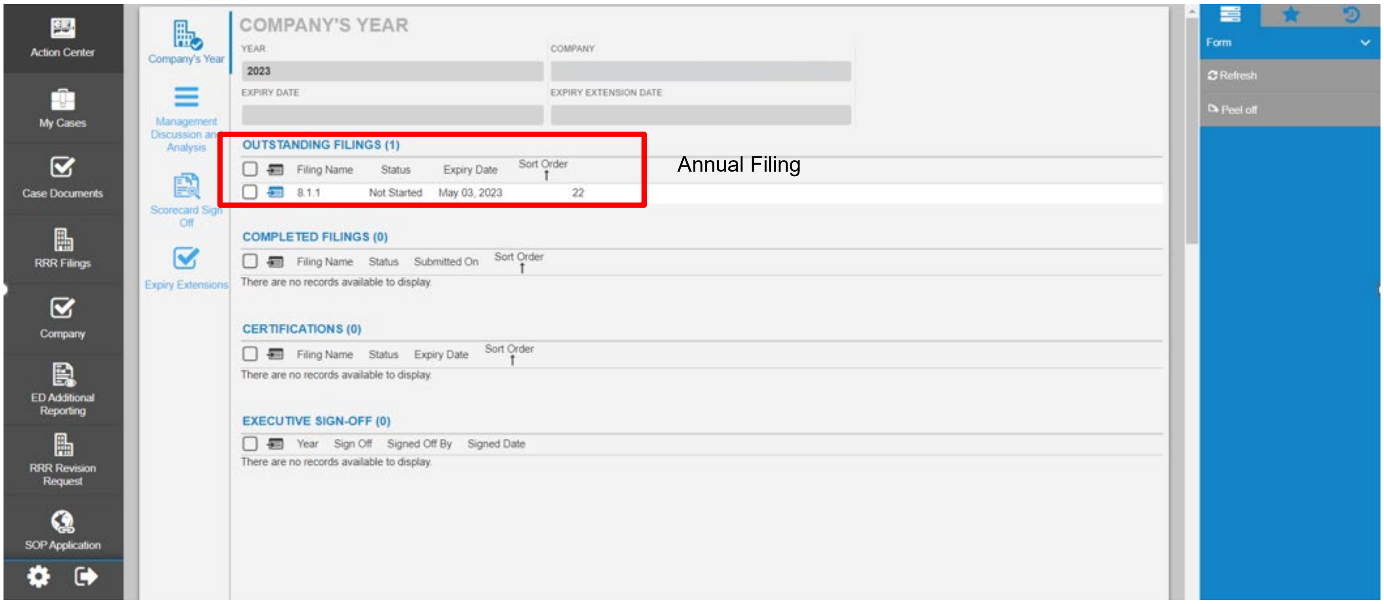


Figure 7 - RRR Reporting Schedule – ER

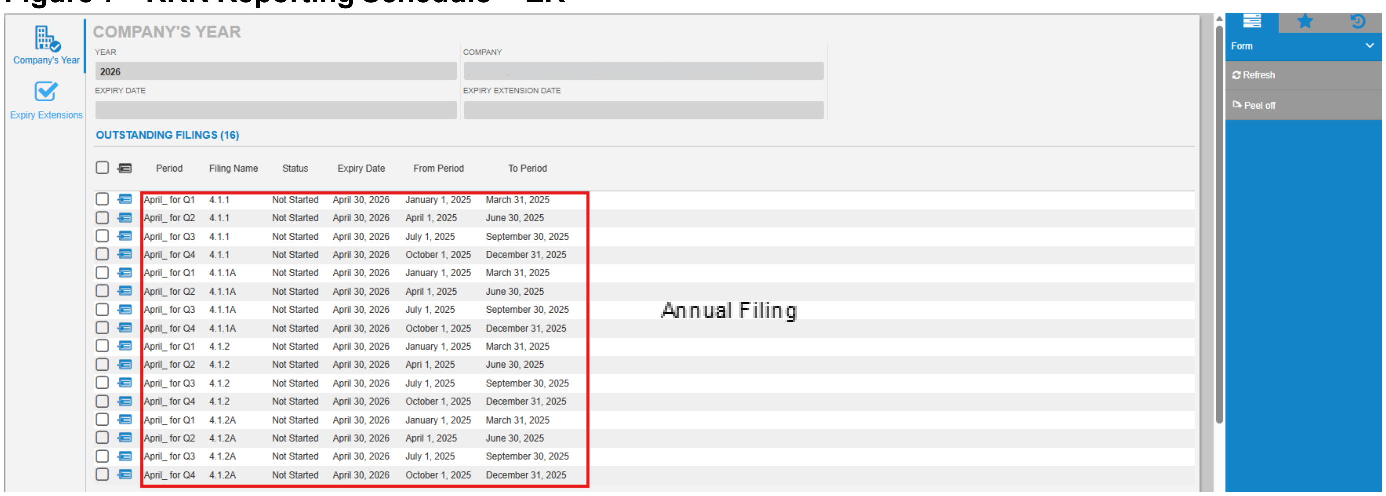
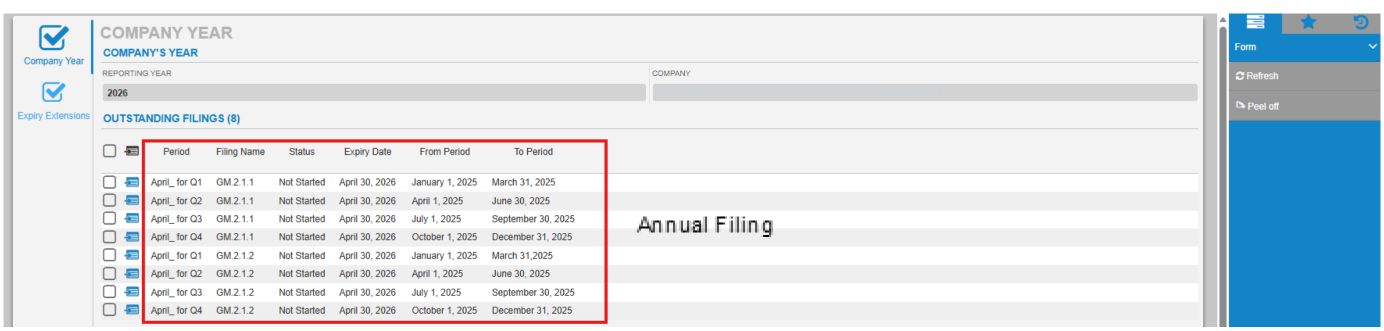


Figure 8 - RRR Reporting Schedule – GM



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

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

Electricity Transmitters:

- The electricity transmitters only have an annual reporting requirement.

Unit Sub Metering (USMP) Providers:

- The USMPs only have an annual reporting requirement.

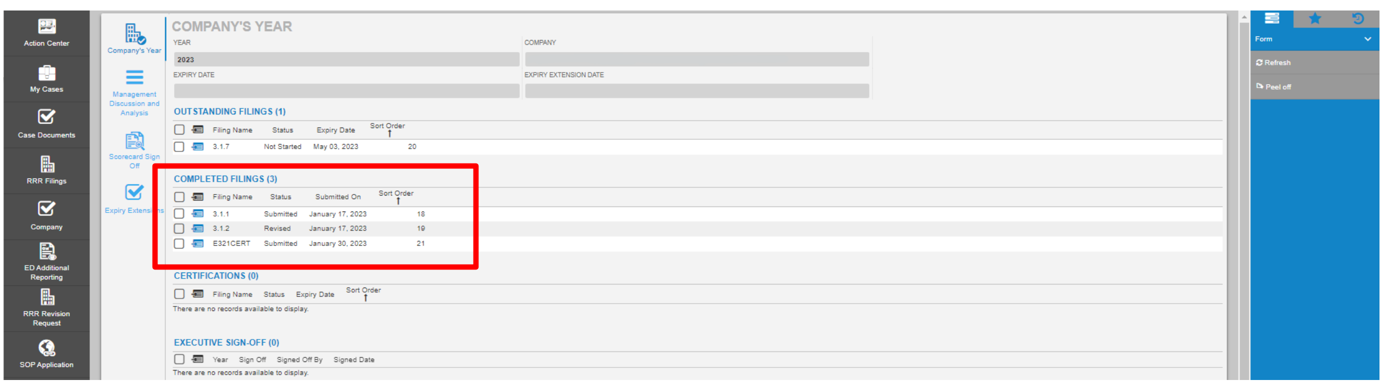
Electricity Retailers and Gas Marketers:

- The electricity retailers and gas marketers only have an annual reporting requirement.
- The filing forms are broken into four quarters.
- Users can select the relevant quarter(s) from the list and enter the information for each corresponding reporting period

6.3. RRR Forms

Once the required annual reporting year is selected, a screen for RRR filings appears as shown in Figure 9: RRR Forms.

Figure 9: RRR Forms



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

7. Submit RRR Filings

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

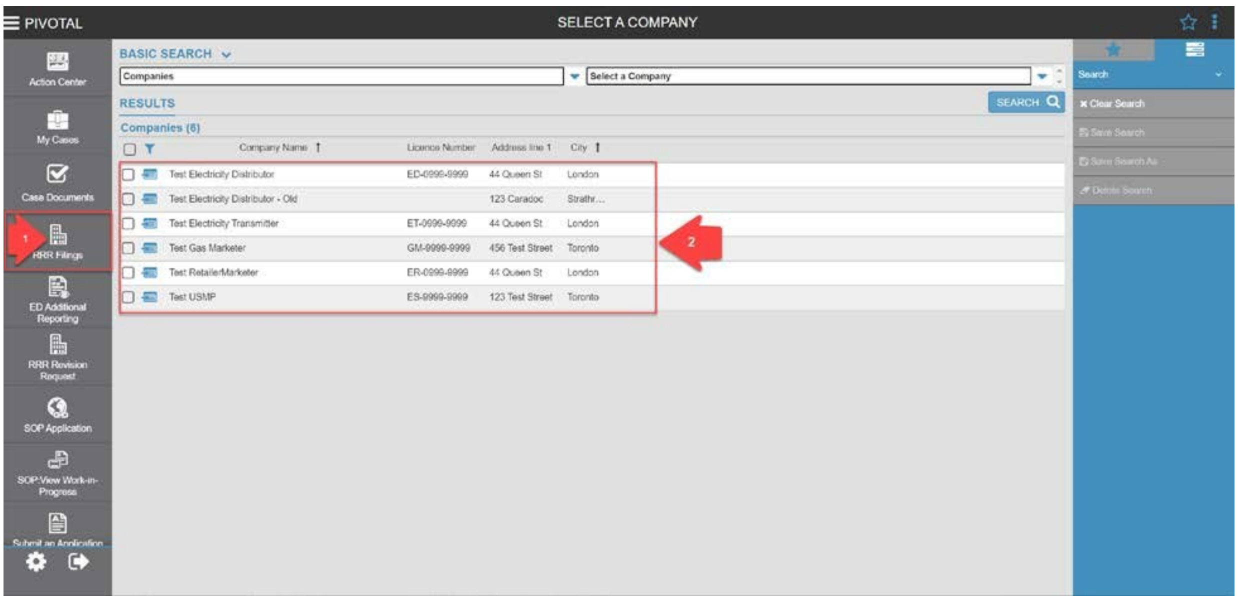
7.1 Select Company Name

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

Step 1: On the left-hand column, please select "RRR Filing".

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

Figure 10: List of Companies



7.2 Access RRR Forms

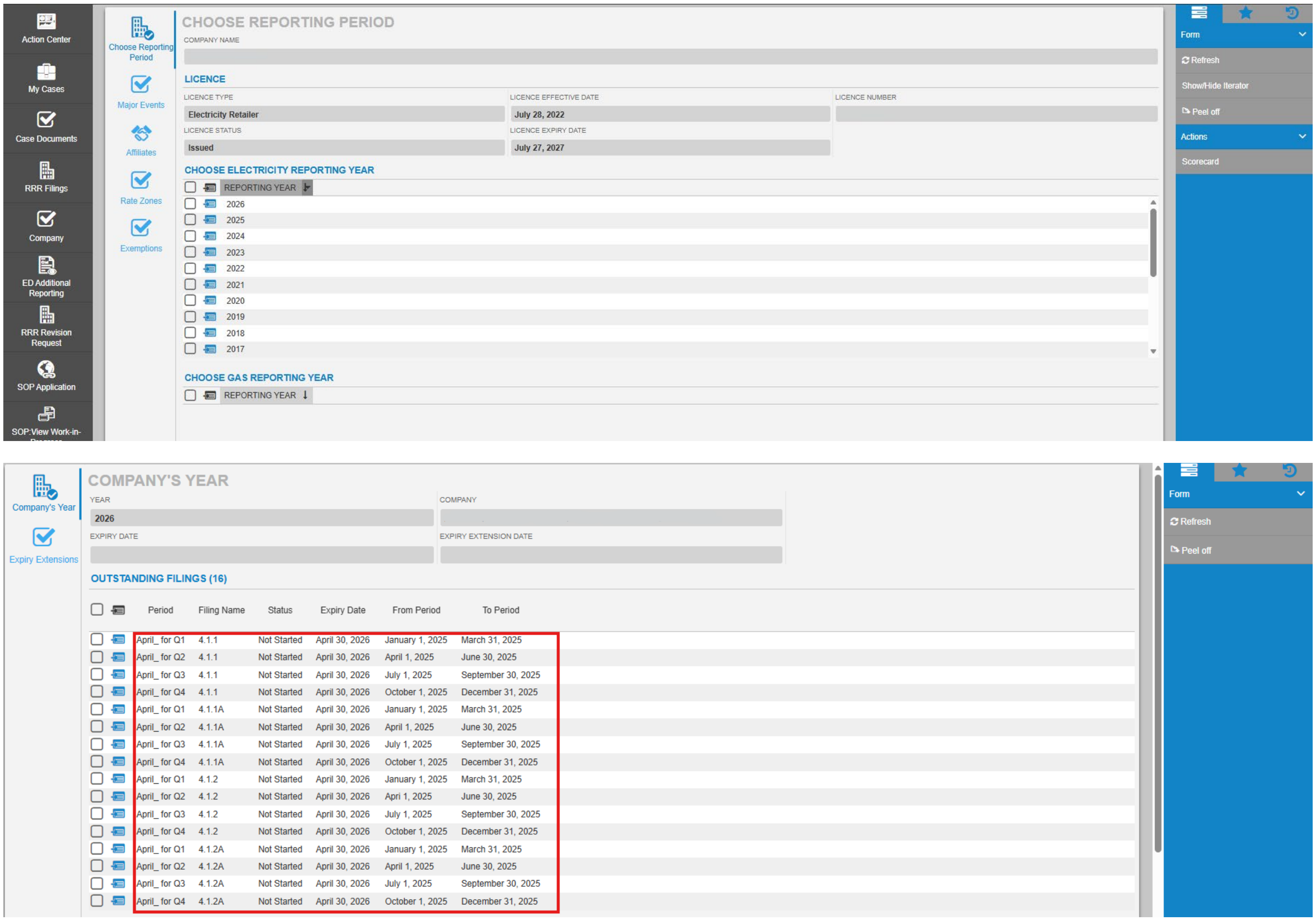
This section provides instructions on accessing the annual RRR filings. The examples below cite electricity retailer and electricity transmitter annual filings. These views are similar for the other licensees in RRR filing system and are based upon the filing schedule.

In order to access any of the annual filing forms broken into quarters for electricity retailers and gas marketers, the user will proceed with the following steps (annual filings are shown in the subsequent example):

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

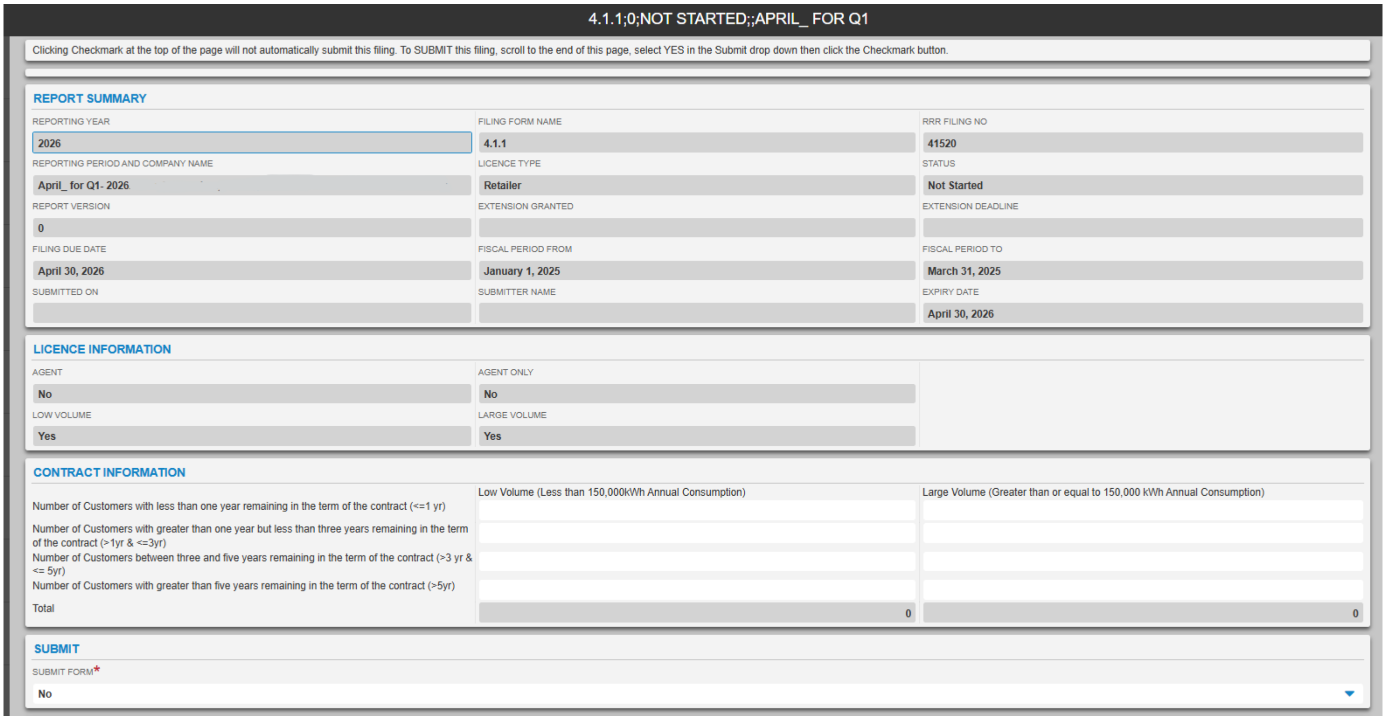
Step 2: Select the desired “From/To Period” from the menu shown in Figure 12. Depending on the reporting period selected, the corresponding RRR forms would then appear on the RRR Forms Screen as shown in Figure 12.

Figure 12: Select Filing Period



Step 3: Click the “enter form” icon ( ) under “Outstanding Filings” to access the form as shown in Figure 13.

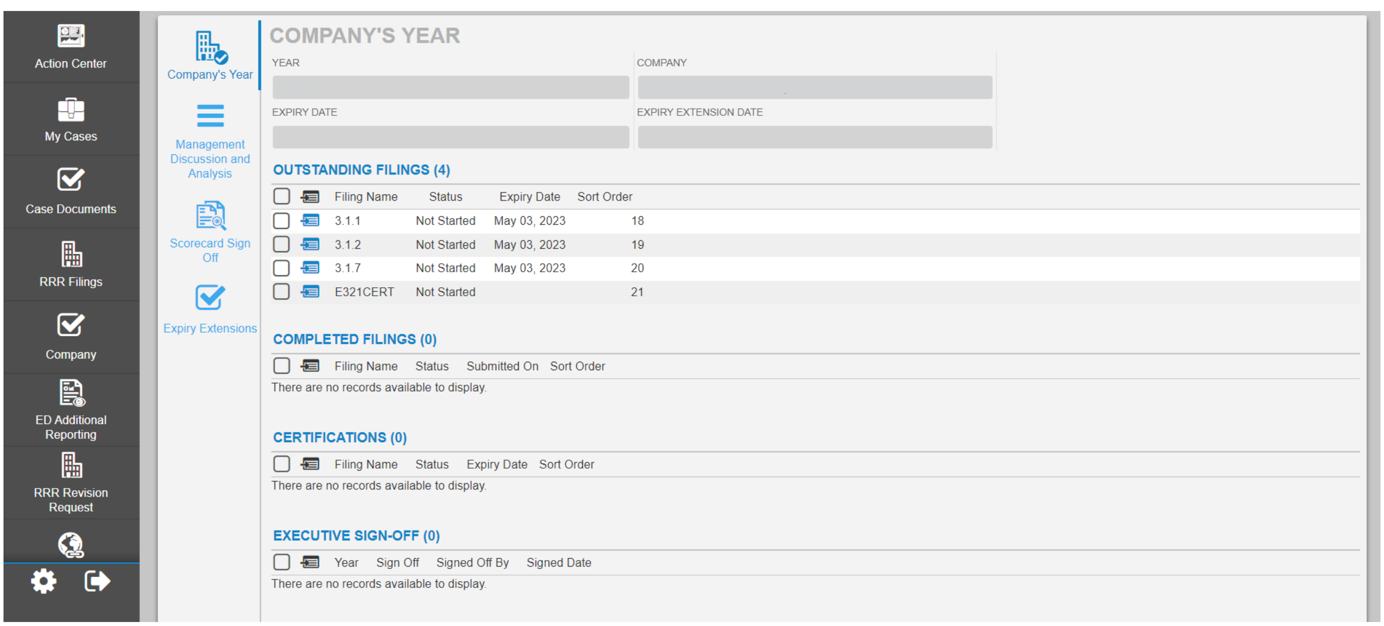
Figure 13: Sample Electricity Retailers Annual Reporting Form (for Q1)



In order to access any of the annual filings for electricity transmitters and USMPs, the user will proceed with the following steps:

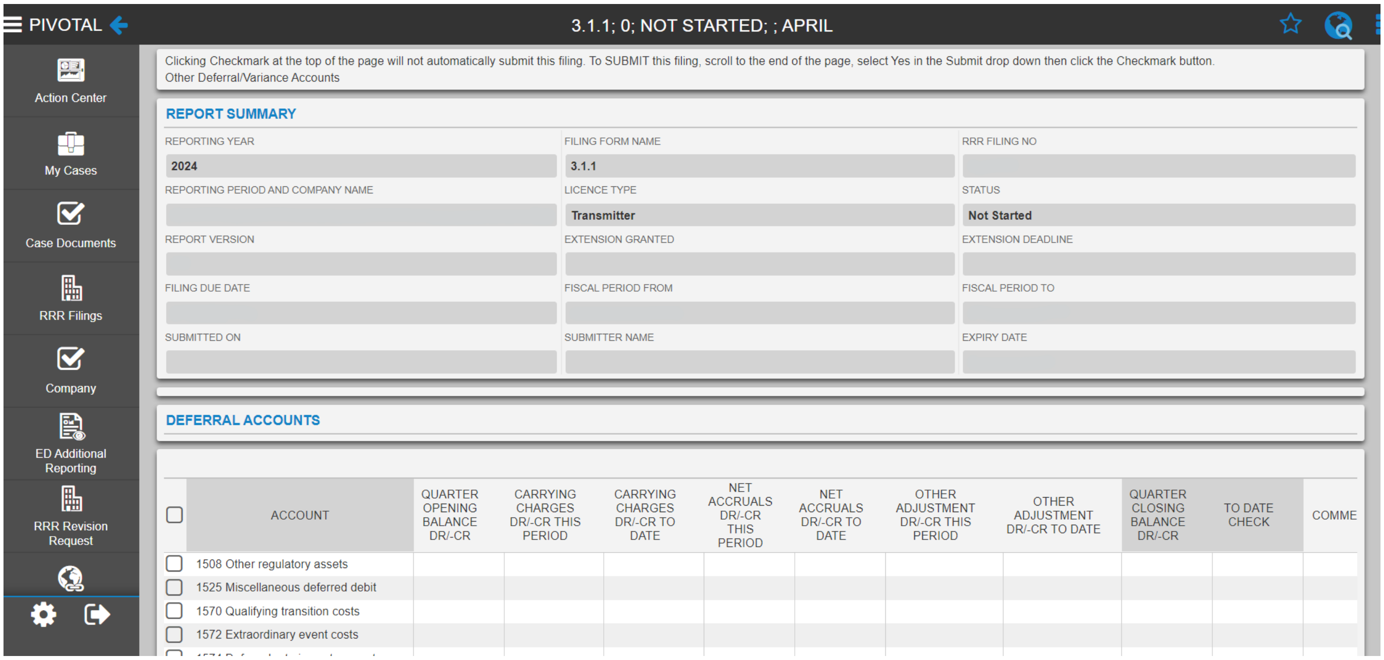
Step 1: Click on “Choose Electricity Reporting Year” as shown in Figure 4 to select reportingyear.
Step 2: the corresponding RRR forms would then appear as shown in Figure 14.

Figure 14: Annual Filing Forms



Step 3: Click the “enter form” icon ( ) under “Outstanding Filings” to access the form as shown in Figure 15.

Figure 15: Sample Electricity Transmitters Annual Reporting Form

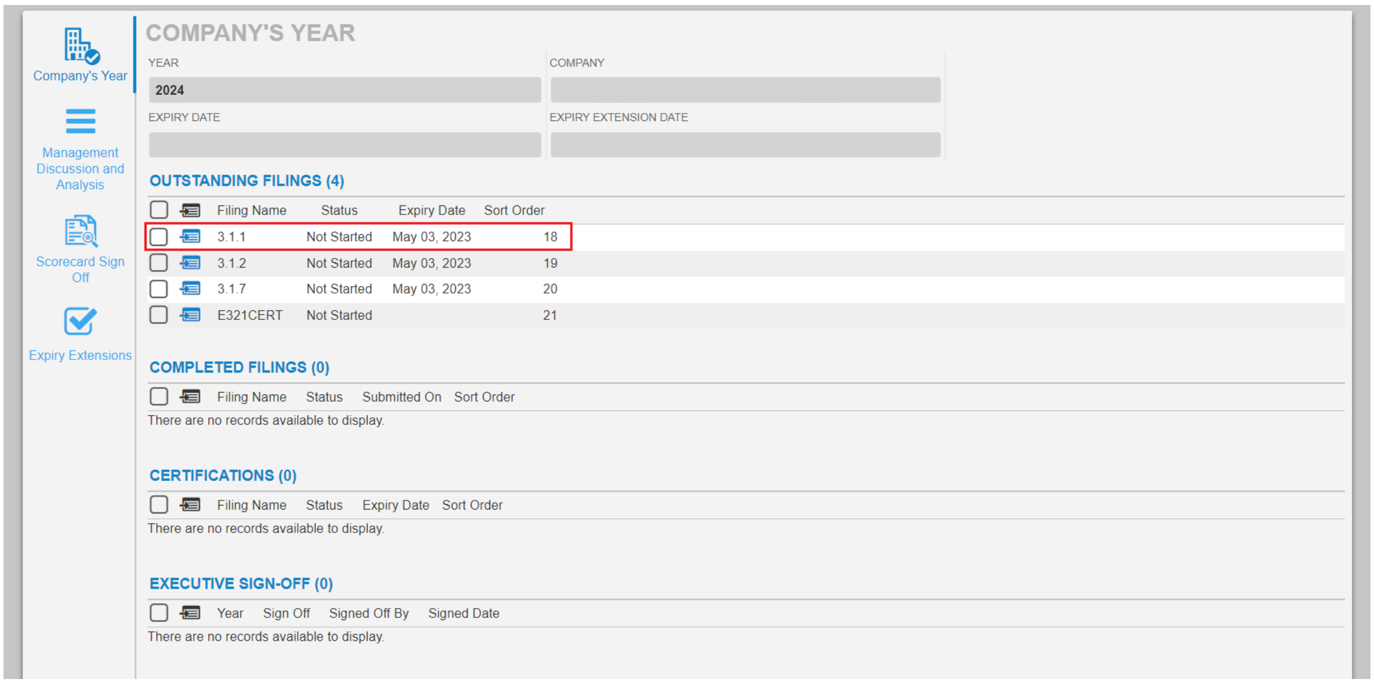


7.3 Submit and View RRR Filings

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

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

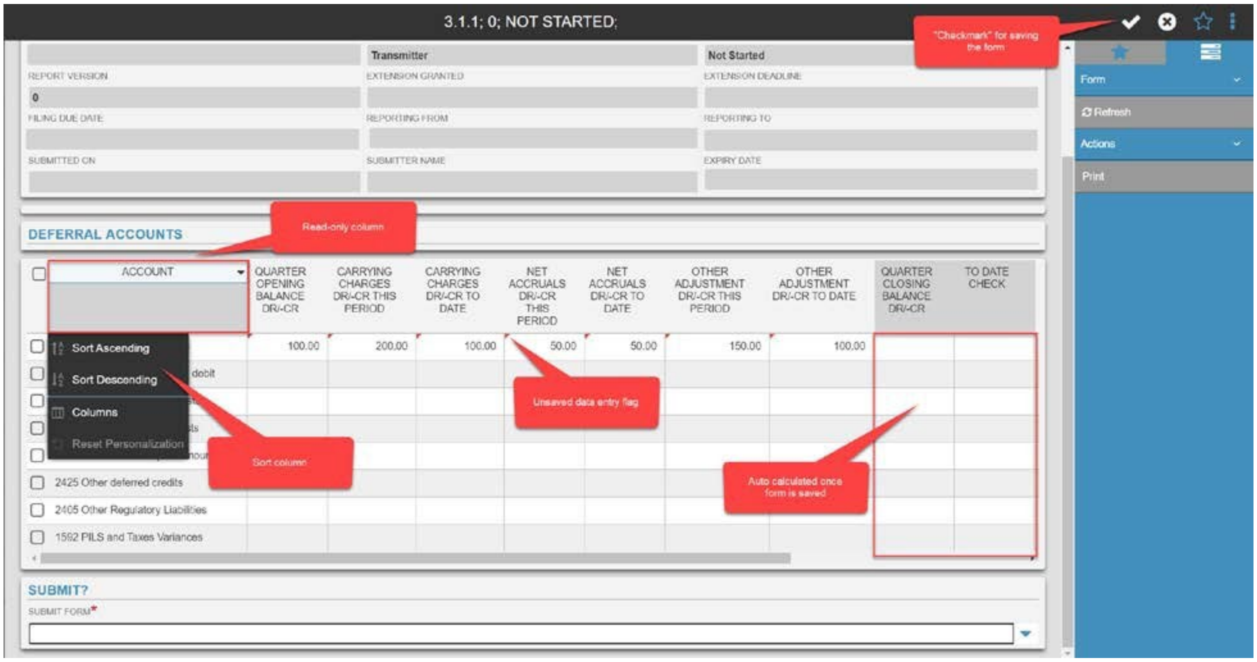
Figure 18: View RRR Filing Status



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

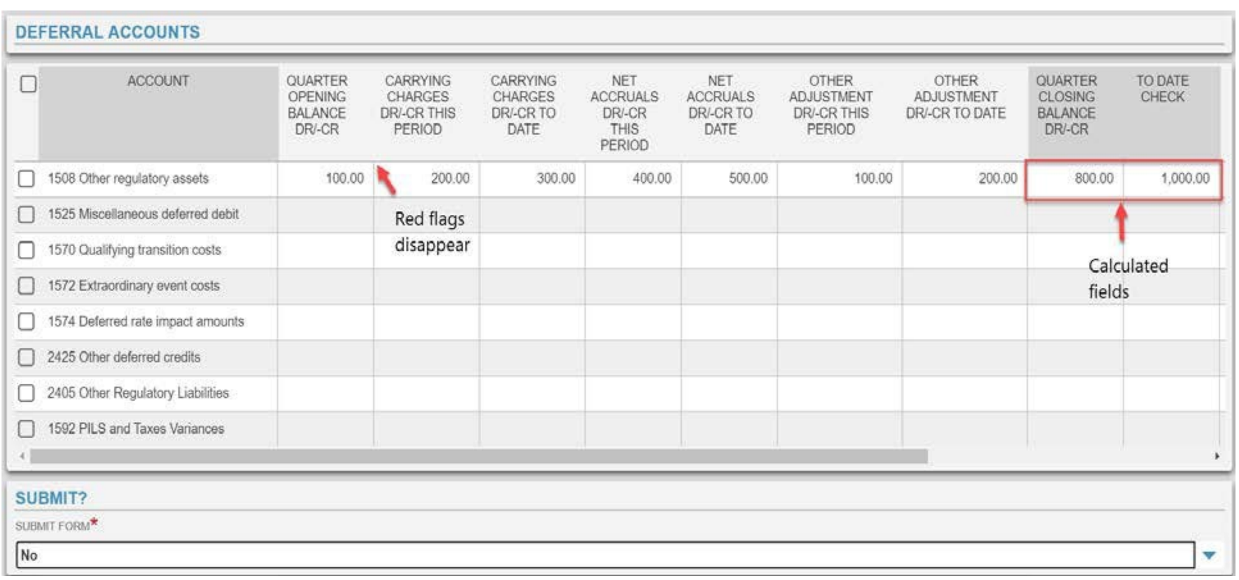
- Sorting entries for the data entered in any of the columns in the table.
    - Sorting based on data – Click on the column header to select ascending or descending
- The read-only column is the Account column in the below example where the user cannot change any fields.
- The system will perform the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

Figure 19: Enter RRR Data



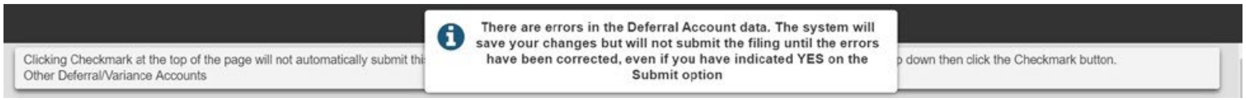
Step 3: Once fields are completed, the user can save the form as a work-in-progress status. This will also enable the auto-calculations and any red flags within the specified data fields will disappear as per Figure 20.

Figure 20: Mandatory Field Error Message



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

Figure 21: Validation Rules



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

Figure 22: Submit RRR Filing Form

7.4 Export Data or Reports and Print Functions

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

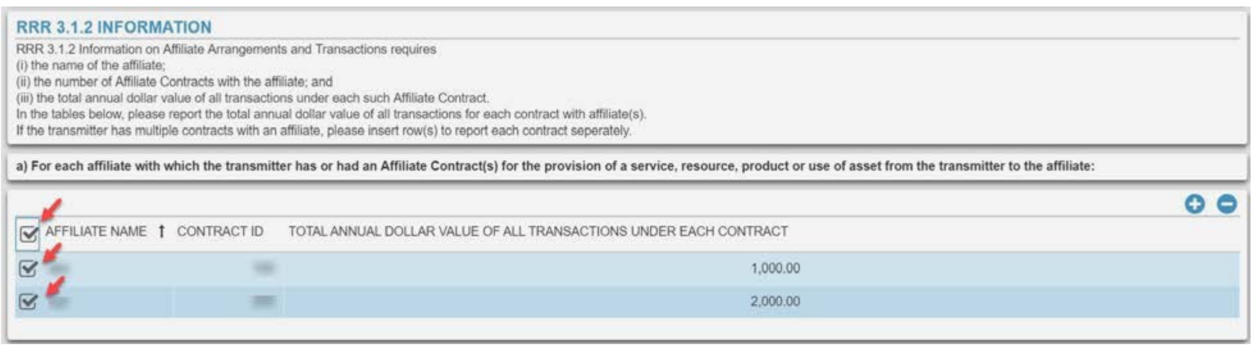
7.4.1. Export data:

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

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

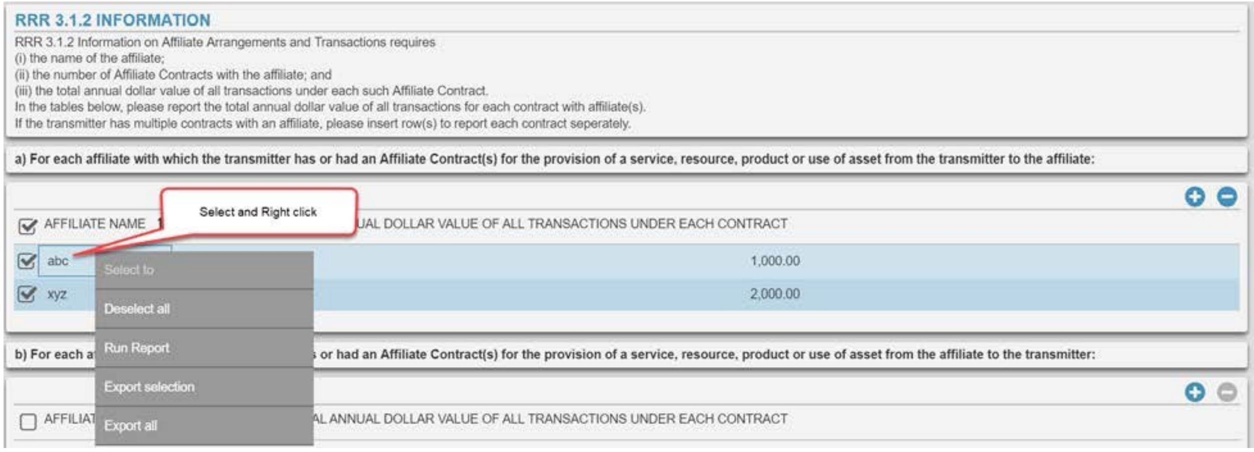
Step 2: Move the pointer over the selection box located on the header of the first column of the table and click on it to select all the row entries (Note: you can make a custom selection by individually selecting or deselecting the rows from the first column). See Figure 23.

Figure 23: Selection Box



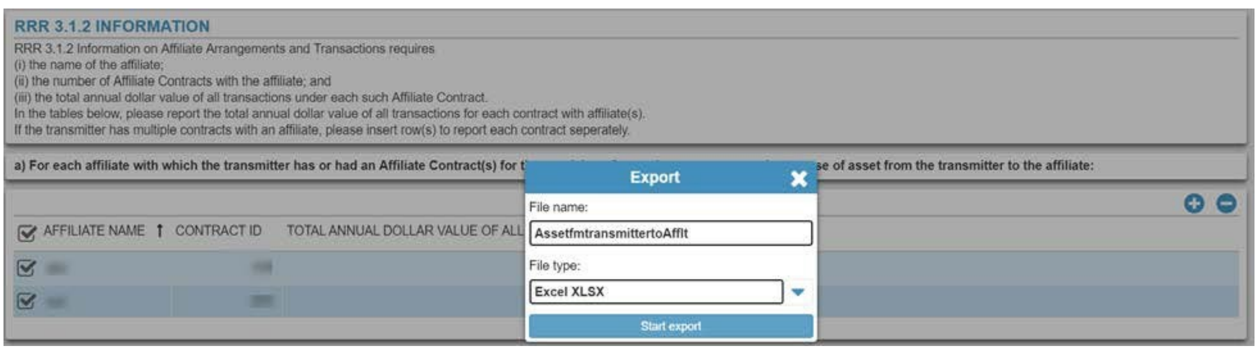
Step 3: Once the desired entries have been selected, right-click anywhere inside the highlighted table to open the menu with options such as "export selection", "export all", etc. See 2.

Figure 24: Export Selection



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

Figure 25: Export File

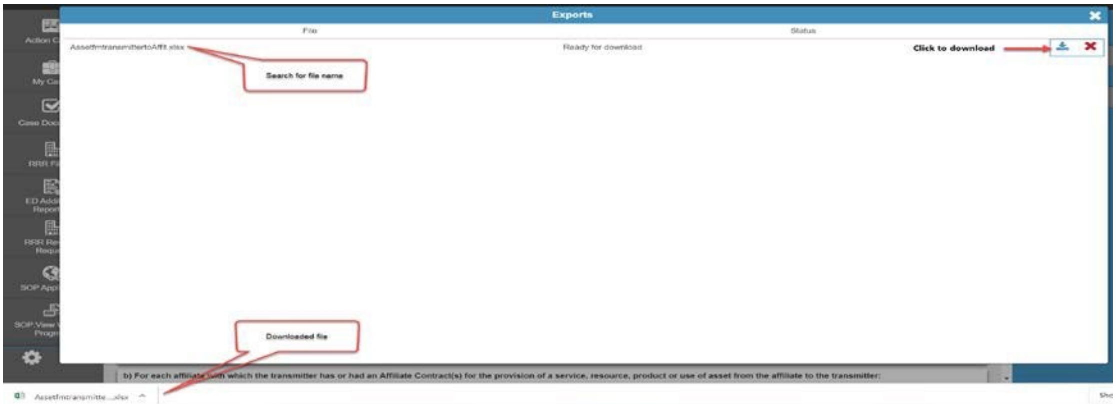


Step 5: Note a special icon () that becomes visible on the top right of the screen. This is the location where all export data queries are saved for further download. Click on the “export data” icon to view and download the exported files, as show in Figure 26.

Figure 26: Export File Download

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

Figure 27: Export File Lookup



7.4.2. Export Report

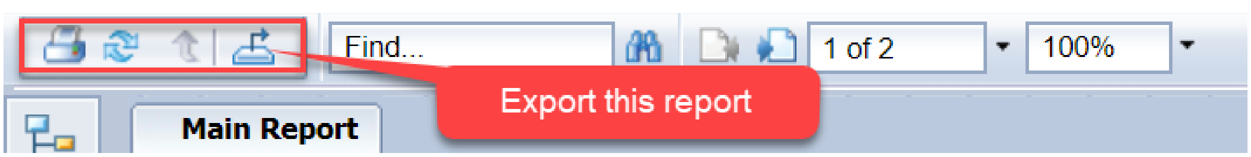
The user can export submitted RRR forms (or select pages) by following procedures similar to those discussed in the export data section above.

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

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

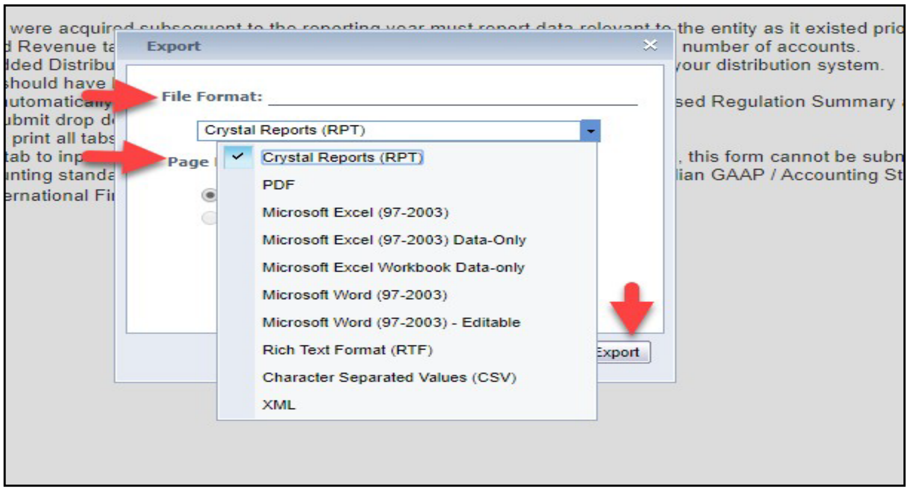
Step 2: Located on the right, the menu bar includes a "Print" button. Through the Print button, the user can create a report for a selected form by clicking on "export this report". See Figure 28. If the right menu bar is not visible, click the icon resembling 3 vertical dots; this toggles the menu on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

Figure 28: Export Selection



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

Figure 29: Export Report Formats



7.4.3. Print Report

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

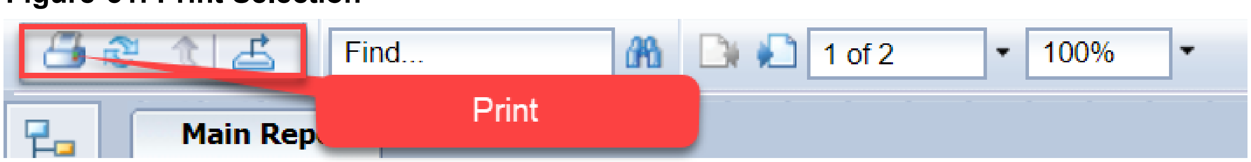
Step 1: Open the desired RRR form using the UX navigation bar and then select thedesired RRR form page(s).

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

Figure 30: Print Report

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

Figure 31: Print Selection



8. RRR Revision Request

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

9. Frequently Asked Questions (FAQS)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

14. Have general IT related questions?

For any general IT related questions, please get in touch with OEB's IT Help at ITHelp@oeb.ca

10. Legend

Action Center	Mandatory field
Add attachment	Menu Option (Show/Hide)
Add/Remove row	Navigation Option (Show/Hide)
Back button	Save data (checkmark) and Cancel data
Enter form (single click)	Selection (export data/order rows)
Export data	Logout
Favourite (Add/Remove)	Unsaved data entry