



BY EMAIL AND WEB POSTING

March 11, 2024

To: All Intervenors

Re: Updates to the OEB Online System for Filing Cost Claims

The Ontario Energy Board (OEB) initiated a review of its online portal for filing cost claims. The review was informed by feedback from system users. Changes are being made to the online cost claim system. The intent is to provide clarity and consistency to the cost claim process and to improve the efficiency of the process.

On **March 18, 2024**, the OEB will launch an update to the online portal for filing cost claims. The update will change the layout and categorization of some cost claim activities, as well as adding one new activity and removing three activities. Many of the activities remain the same.

A guidance document has been drafted to support the filing of cost claims and is attached as Appendix B. It provides an explanation of each of the activities. The changes are further described below and set out in a table attached as Appendix A.

Description of Changes

- Revised Category and Activity:
 - Review Application and Evidence is replaced with Discovery/Read and Research Application
- NEW Activity:
 - Procedural/Review procedural documents
- Collapsed categories:
 - Issues List, Confidentiality, and Motions categories are now Procedural

- Renamed categories:
 - Settlement/ADR category is now Settlement
 - Submissions is now Written Argument
 - Oral Hearing and Submissions/Oral Submissions is now Oral Argument
 - Rate Order is now Decision
 - Other Attendance is now Other

- Activities removed:
 - Confidentiality/Attendance at Hearing on Confidentiality
 - Communication/With Other Parties
 - Communication/With Client

To ensure a seamless transition to the revised layout, the portal must be free of cost claim activity. To this end, any intervenors in EB-2023-0326 are asked to submit their cost claims in the portal by **March 15, 2024**.

Once the portal is clear of cost claim activity, the updates will be added to production and tested to ensure there are no conflicts in the system.

Please note that after **March 18, 2024**, all cases where cost claims are initiated will use the revised list of activities. We ask that intervenors:

- Review the list of changes against any personal templates used to track hours
- Review the Guidance for Online Cost Claim Submissions document that is issued with this letter

Information Sessions

The OEB will host a virtual session to answer any questions about the updated online system on **March 21, 2024**, 10:00 a.m. to 11:00 a.m. If you are interested in participating, please email Registrar@oeb.ca by **March 15, 2024**. A calendar appointment with the meeting invitation link will be sent directly to you.

If you have any questions about this update, please contact the Office of the Registrar at Registrar@oeb.ca.

Yours truly,

Nancy Marconi
Registrar

Appendix A Table of Revised Activities

Original Category	Original Activity	Revised Category	Revised Activity
Review Application and Evidence	Review Application and Evidence	Discovery	Read and Research Application
Discovery	Preparation of Interrogatories	Discovery	Preparation of Interrogatories
Discovery	Review Interrogatory Responses	Discovery	Review Interrogatory Responses
Discovery	Technical Conference Preparation	Discovery	Technical Conference Preparation
Discovery	Technical Conference Attendance	Discovery	Technical Conference Attendance
Discovery	Technical Conference Follow Up	Discovery	Technical Conference Follow-up
Issues List	Preparation	Procedural	Preparation of Issues List Submission
Issues List	Attendance at Issues Conference	Procedural	Attendance at Issues List Conference
Confidentiality	Preparation of Application for Confidentiality	Procedural	Preparation for a confidentiality request
Confidentiality	Prepare Submissions on Confidentiality	Procedural	Prepare Submissions on confidentiality
Confidentiality	Attendance at Hearing on Confidentiality		Activity removed
Motions	Preparation of Motion(s) Materials	Procedural	Preparation of Motion(s) materials
Motions	Prepare Submissions on the Motion(s)	Procedural	Prepare submissions on the Motion(s)
Motions	Attendance at Hearing on Motion(s)	Procedural	Attendance at hearing on Motion(s)
		Procedural (New)	Review procedural documents
Intervenor Evidence	Preparation	Intervenor Evidence	Preparation of Intervenor Evidence
Intervenor Evidence	Interrogatory Responses	Intervenor Evidence	Interrogatory Responses
Intervenor Evidence	Preparation of Witness(es) for Attendance at Hearing	Intervenor Evidence	Preparation of Witness(es) for Attendance at Hearing
Settlement/ADR	Preparation	Settlement	Preparation for Settlement Conference
Settlement/ADR	Attendance	Settlement	Attendance at Settlement Conference
Settlement/ADR	Preparation of Settlement Proposal	Settlement	Preparation of Settlement Proposal
Settlement/ADR	Attendance at Presentation to Panel	Settlement	Attendance at Presentation to Panel

Original Category	Original Activity	Revised Category	Revised Activity
Submissions	Written Submissions	Written Argument	Written Submissions
Oral Hearing	Preparation	Oral Argument	Preparation for Oral Hearing
Oral Hearing	Attendance at Oral Hearing	Oral Argument	Attendance at Oral Hearing
Submissions	Oral Submissions	Oral Argument	Oral Submissions
Submissions	Attendance at Oral Submissions	Oral Argument	Attendance at Oral Submissions
Decision	Review	Decision	Review Decision
Rate Order	Review	Decision	Review Rate/Accounting Order
Rate Order	Prepare Submission on Rate Order	Decision	Prepare Submission on Rate Order
Other Attendance	Other Attendance	Other	Other attendance (e.g., Intervenor Conferences)
Communication	With Other Parties		Activity removed
Communication	With Client		Activity removed

APPENDIX B

GUIDANCE FOR ONLINE COST CLAIM SUBMISSIONS



Guidance for Online Cost Claim Submissions

Cost claims at the OEB are filed through a secure online portal. If you are a new intervenor, you must ensure you have your own log-on credentials, and your support staff who handles cost claims must have their own.

Information on registering for portal access, as well as contact information, training guides, and walk-through videos are available on the Intervenor Information and Filing Systems pages of the OEB's website.

Please review the guide when you prepare your claim to ensure you allocate your costs to the appropriate activity.

Category	Activity	Guidance
Discovery	Read and Research Application and Evidence	The number of hours spent reading and researching the submitted application and evidence. If you develop interrogatories while reviewing the application and evidence, report such hours under the 'Preparation of Interrogatories' category.
	Preparation of Interrogatories	The number of hours spent reviewing the application and evidence to prepare interrogatories on the application and evidence as well as any evidentiary updates, supplemental rounds of discovery, and expert evidence.
	Review Interrogatory Responses	The number of hours spent reviewing responses to interrogatories for technical conferences, settlement conferences, or submissions. If you develop technical/settlement conference questions while reviewing interrogatory responses, you may divide the hours equally between the respective categories and identify that in your cover letter.
	Technical Conference Preparation	The number of hours spent preparing to attend the technical conference (e.g., drafting questions to ask). If you develop technical conference questions while reviewing interrogatory responses, you may divide the hours equally between the respective categories and identify that in your cover letter.
	Technical Conference Attendance	The number of hours spent in attendance at a technical conference.
	Technical Conference Follow-up	The number of hours spent reviewing undertakings or any other evidence filed in response to requests/discussions at the technical conference.

Category	Activity	Guidance
Procedural	Preparation of Issues List Submission	The number of hours spent preparing submissions on the issues list and any hours spent preparing a list of issues, not including those on the standard issues list. If issues are noted during the initial review of the application, apply some of those hours to this category. If applicable, include the number of hours spent preparing submissions on refusals and/or preparing to attend a refusals hearing (e.g., drafting verbal argument for why a response should not be refused).
	Attendance at Issues List Conference	The number of hours spent in attendance at an issues conference. If applicable, this can also include attendance at a refusals hearing.
	Preparation for a confidentiality request	The number of hours spent reviewing a confidentiality request. Or, if expert evidence requires confidential treatment when filing, report the number of hours required to prepare your confidentiality request in this category.
	Prepare submissions on confidentiality	The number of hours spent preparing submissions on a confidentiality request.
	Preparation of Motion(s) materials	The number of hours spent preparing materials for a motion(s) (e.g., drafting a motion). If applicable, this also includes the number of hours spent preparing materials for a hearing on motion(s).
	Prepare submissions on the Motion(s)	The number of hours spent preparing submissions on the motion(s) or preparing a reply submission on the motion(s).
	Attendance at hearing on Motion(s)	The number of hours spent in attendance at a hearing on motion(s).
	Review procedural documents	The number of hours spent reviewing other procedural documents where the OEB is soliciting comment, such as P.O. No. 1, letters of correspondence, OEB staff submission on settlement conference, confidentiality decisions, interlocutory motion decisions, blue page updates, and submissions on rate orders.
Intervenor Evidence	Preparation of Intervenor Evidence	The number of hours spent preparing/coordinating your expert evidence to be filed.
	Interrogatory Responses	The number of hours spent preparing interrogatory responses to questions on your expert evidence.
	Preparation of Witness(es) for Attendance at Hearing	The number of hours spent preparing your expert witness(es) for their attendance at an oral hearing.
Settlement Conference	Preparation for Settlement Conference	The number of hours spent preparing for the settlement conference (e.g., drafting of positions, seeking clarification of questions from the applicant). This includes any hours spent in communication with your client regarding positions to take in

Category	Activity	Guidance
		settlement. If you develop settlement conference questions while reviewing interrogatory responses, you may divide the hours equally between the respective categories and identify that in your cover letter.
	Attendance at Settlement Conference	The number of hours spent in attendance at the settlement conference.
	Preparation of Settlement Proposal	The number of hours spent reviewing and providing edits and/or comments on the settlement proposal.
	Attendance at Presentation to Panel	The number of hours spent in attendance at a settlement presentation to the Panel.
Written Argument	Written Submissions	The number of hours spent preparing a final written argument for the proceeding.
Oral Argument	Preparation for Oral Hearing	The number of hours spent preparing for the oral hearing (e.g., preparing cross-examination, compendium development).
	Attendance at Oral Hearing	The number of hours spent in attendance at an oral hearing.
	Oral Submissions	The number of hours spent preparing oral submissions.
	Attendance at Oral Submissions	The number of hours spent attending or presenting oral submissions.
Decision	Review Decision	The number of hours spent reviewing the final decision and order of the OEB. This may include time spent reporting back to the client about the decision.
	Review Rate/Accounting Order	The number of hours spent reviewing the Draft Rate or Accounting Order.
	Prepare Submission on Rate Order	The number of hours spent preparing a submission on the Draft Rate or Accounting Order.
Other	Other attendance (e.g., Intervenor Conferences)	The number of hours spent attending any other OEB-related conferences regarding the proceeding that are not already identified in this form.