Content Links

To facilitate navigation through this guide, you can immediately jump to the content you wish to read using the links below:

- How to create a new FOIP request >> FOIP Requests

- How to communicate with the AESO FOIP Analysts through the Message Channel >> Message Channel

- How to download all data and documents of a FOIP request into a ZIP file >> Download all FOIP related data and documents

- Appendix A – Further Guidance on Completing and Submitting the FOIP Request Form >> Appendix A

Alberta Electric System Operator

Calgary Place, 2500, 330 - 5th Avenue SW Calgary, AB T2P 0L4
Phone: 403-539-2450 | Fax: 403-539-2949

www.aeso.ca
@theaeso

# Creating A New FOIP Request

Purpose:

The following steps will show you how to create a new FOIP request in the AESO FOIP Portal.

Precondition(s):

1. Applicant has an existing user account in the AESO FOIP Portal (refer to Quick Reference Guide – FOIP Sign-up).

Step 1: Complete and submit required information in new FOIP Request form.

1. Go to the AESO FOIP Portal page by following this link >> https://aeso-portal.powerappsportals.com/ and sign in to your existing user account.

2. Click "New" in the following toolbar to open a New FOIP Form.
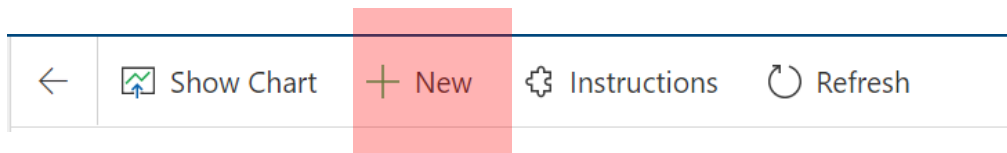
3. In the New FOIP Form screen, complete the required fields in the Request tab. Required fields are located in the *Application Information* and *Request Information* sections.


Note: Required fields are denoted by (*). If you are unsure on what information to enter on a particular field, help descriptions appear by hovering your mouse over the field.

Step 2A: Follow these steps if you are not ready to submit your FOIP request to the FOIP Office just yet but want to save your progress.

* if you are ready to submit your FOIP request, please proceed to Step 2B *

1. If you are not ready to submit the FOIP request and would like to go back to the form at a later date, click *Save & Close* in the toolbar:
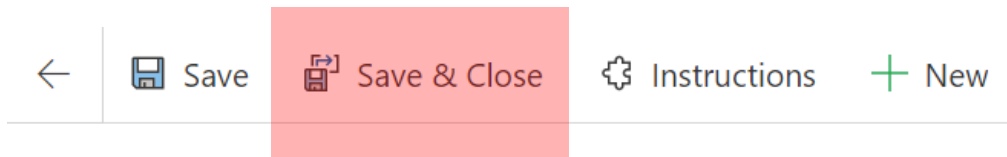
2. The following message will appear. Select *Save and continue* to go back to the form or Discard changes if you would like to start over.
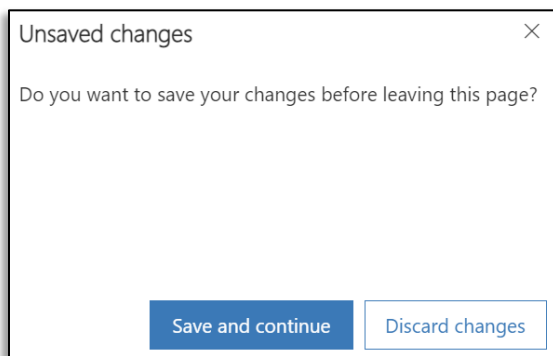
3. After clicking *Save and continue*, you will be redirected to the main page where you will see your Active FOIP Requests. Your saved request will be in the list with just the Applicant information.
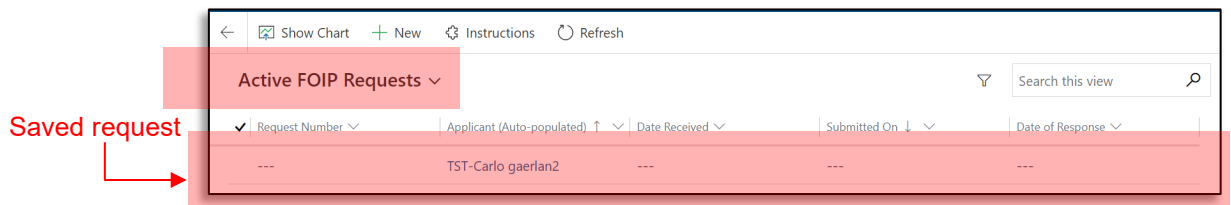
4. To open the saved request, double click on any white space in the request row.

Step 2B: You are ready to submit your public body consultation to the AESO FOIP Office.

1. If you are ready to submit the FOIP request, click *Save*.

←   🖫 Save   🖫 Save & Close   ⚙ Instructions   ＋ New

2. Once you click Save, the *Submit* button will appear in the toolbar. Click Submit.

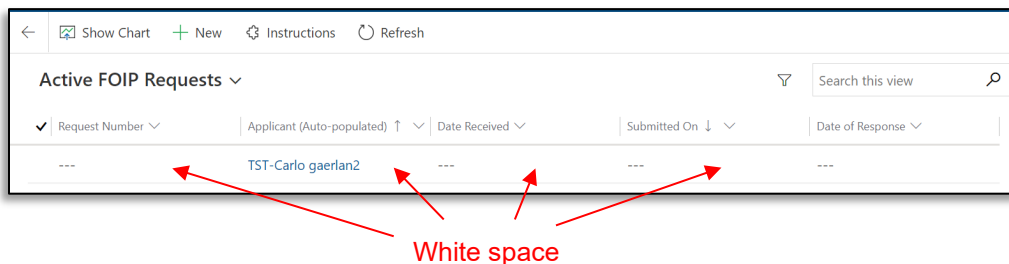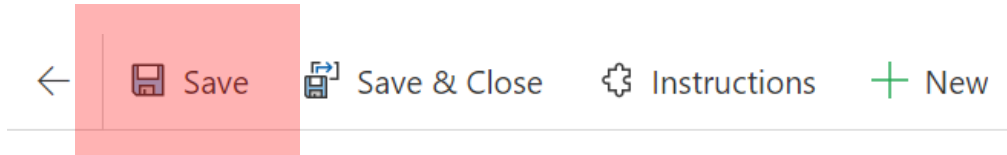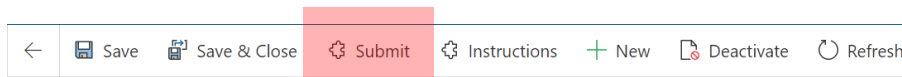←   🖫 Save   🖫 Save & Close   ⚙ Submit   ⚙ Instructions   ＋ New   🗋 Deactivate   ↻ Refresh

3. At this point, you can attach any documents you want to include in your FOIP request submission. Some examples include proof of authority to act on behalf of another person; additional scope details; and a scan of your initial fee cheque to evidence that payment is on its way. Click on the *Documents* menu item.

FOIP Request
FOIP Form

Request   **Documents**   ZIP File   Related
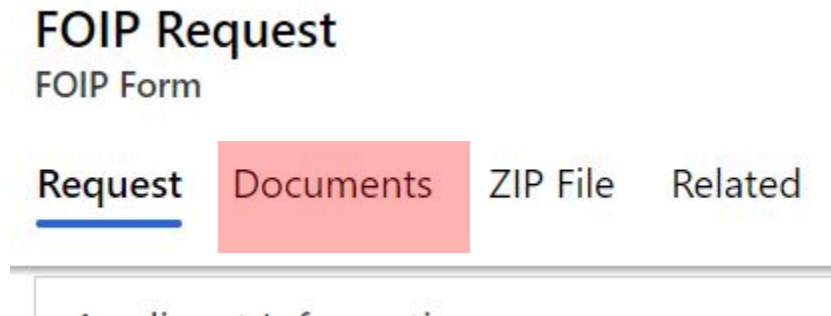
4. Click on the *Upload* menu that should display at the right of the window. If it doesn't appear, you may have to click on the vertical ellipses first (also on the right) in order to see the Upload menu item. Please note that you have to upload your documents one at a time.
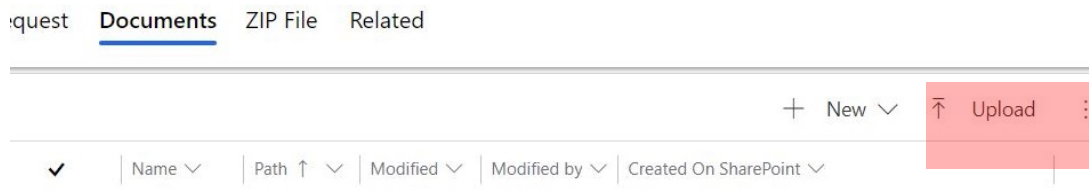
quest   **Documents**   ZIP File   Related

＋ New ∨   ⤒ Upload   ⋮

✓ | Name ∨ | Path ↑ ∨ | Modified ∨ | Modified by ∨ | Created On SharePoint ∨

Note: If you upload a document with the same name as a previous upload *within the same message*, you will overwrite the existing file. In order to properly capture different versions of documents, it is recommended that you save the document under a different name before uploading.

5. The message below will display. If any document is larger than 50MB, please contact our office. Click on the *OK* button. Your documents should appear in the list momentarily.
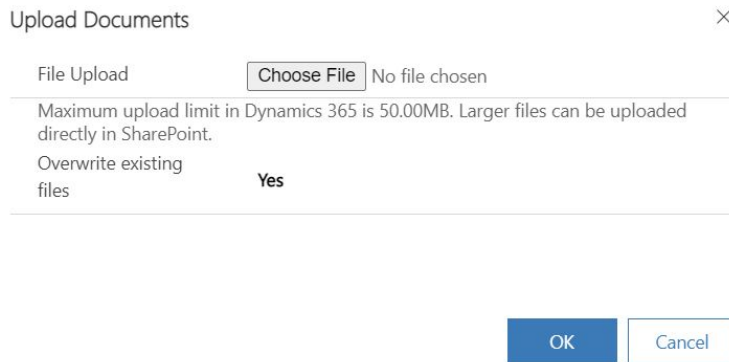
6. If you are now ready to submit your FOIP request, you can click on the *Submit* button up in the toolbar at any time. If you want to modify any information on the previous page, you can click on the *Request* menu item; make your changes; and then click on the *Submit* button.

7. A confirmation message will appear. Click *OK*.
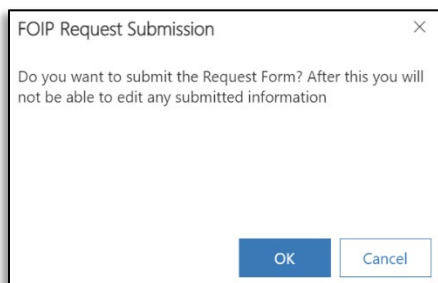
8. Your request has now been successfully submitted. You will be redirected to the main page, and the date of submission will appear in the *Submitted On* column of the list.

[Back to Top](#)

![aeso](aeso logo)

Message Channel

Purpose:

The steps will show you how to communicate with the AESO FOIP Analysts through the Message Channel in the portal. The Message Channel is used to exchange messages with the AESO FOIP Analyst and submitting or receiving additional documentation to or from the AESO FOIP Analyst.

Precondition(s):

1. Applicant has submitted a new FOIP request in the AESO FOIP Portal.

2. The AESO has received the Applicant's new FOIP request and has assigned it a request number.

To help you understand how the Message Channel feature works, please keep in mind that one request form can contain multiple messages. Each message may have several notes within it. Think of notes as a single email string related to one topic (i.e., a message). Each message will also have its own documents section within it, as illustrated below.
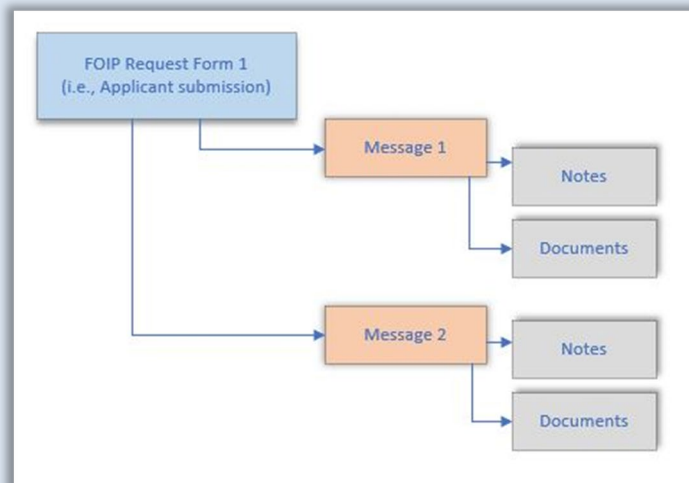
Action 1: Read messages from the AESO FOIP Analyst.

(Note: You will get an email notification when receiving a new message from the FOIP Analyst.)

1. Open your FOIP request from the list of Active FOIP Requests.

←	Show Chart	+ New	Instructions	Refresh				

Active FOIP Requests ∨

✓	Request Number ∨	Applicant (Auto-populated) ↑ ∨	Date Received ∨	Submitted On ↓ ∨	Date of Response ∨
	2030-A-001	TST-Carlo gaerlan2	5/18/2021	5/18/2021	---

2. Scroll down through the FOIP form and locate the *Message Channel* section. Double click on the row that you would like to open.

Message Channel   + New Messages

✓	FOIP Request Nu... ↓ ∨	Other Party ∨	AESO Team ∨	Subject ∨	Created By ∨	Modified On ↓ ∨
	2030-A-001	TST-Carlo gaerlan2	FOIP Analysts	Receipt of FOIP Re...	TST-Carlo gaerlan1	5/18/2021 3:20 PM

3. The messages will appear in the *Timeline* section.

Message
Messages

General   Documents   Related

AESO Team	FOIP Analysts
Other Party	TST-Carlo gaerlan2
FOIP Request Number (Auto-populated)	2030-A-001

FOIP Request Number will be auto-populated when you click the 'Initiate' button.

IS OIPC	No
Subject	Receipt of FOIP Request 2030-A-001

Timeline

Search timeline

Enter a note...

TG   Note modified by TST-Carlo gaerlan1
Please see attached file in the Documents tab. Thanks, FOIP Analyst

TG   Note modified by TST-Carlo gaerlan1
This is to confirm that the AESO has received your request.

Regards,
FOIP Analyst

     Public

Action 2: Open documents received from the AESO FOIP Analyst through a message.

1. Go to the *Documents* tab.
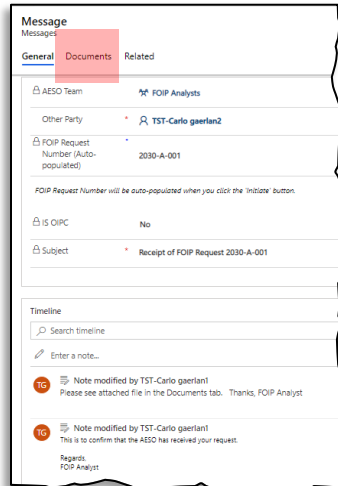
2. Click on the name of the document to open it.
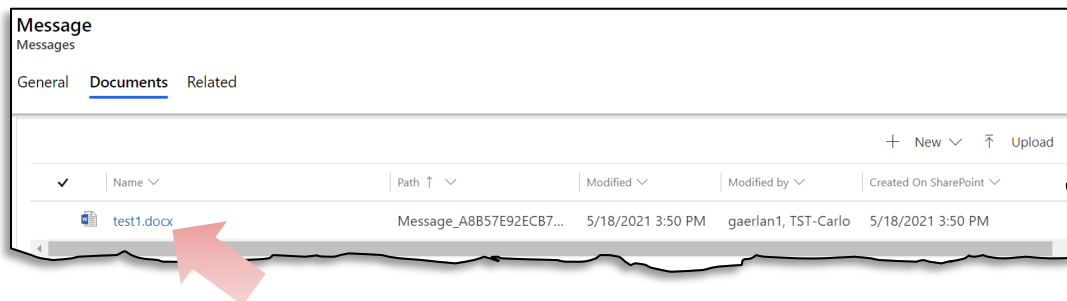
Action 3: Send a new message to the AESO FOIP Analyst.

1. In the Message Channel section of your FOIP Form, click on *New Messages*.
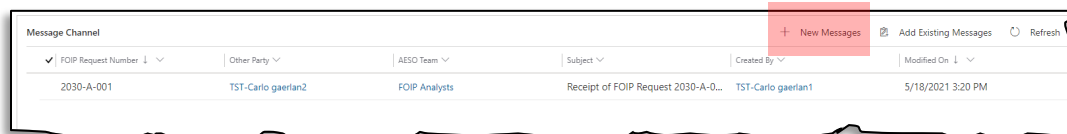
2. Enter a text in the Subject line of the new message and then click on the *Initiate* button.
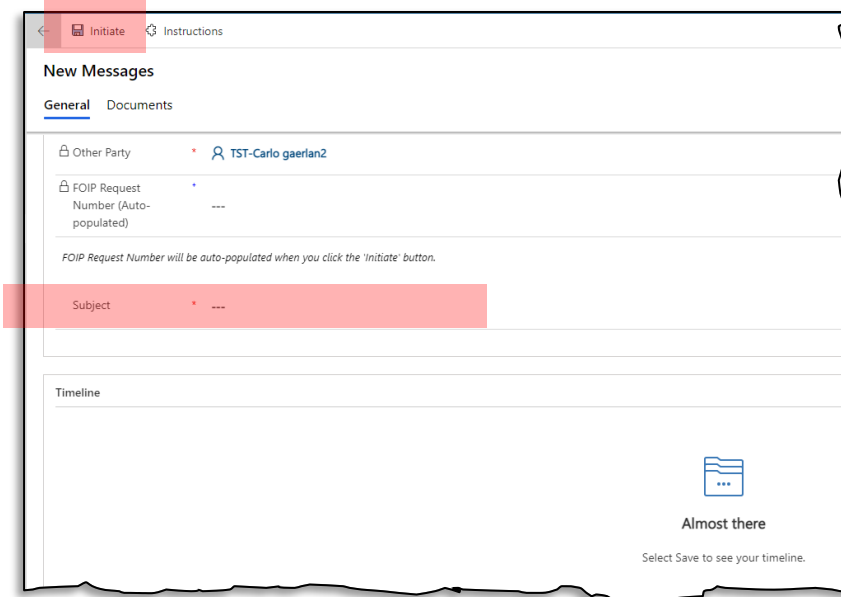
3. The ability to add a note or message will then appear in the *Timeline* section. Click on *Enter a note*. Add a title in the *Title* text box if needed or just type your message directly in the *Enter text…* field. Then click the *Add note* button.
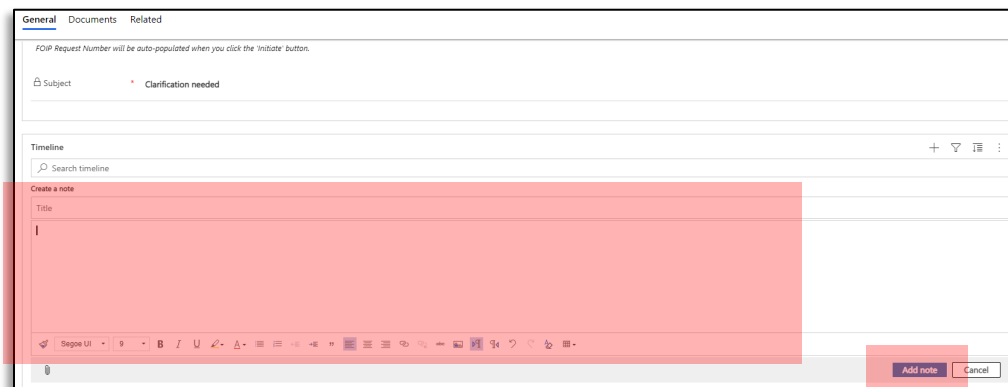
4. The AESO FOIP Analyst will be notified via email of your new message.

   Note: To upload documents with your message, see **Action 5**.

Action 4: Reply to a message in the Message Channel.

1. In the Message Channel section of your FOIP Form, double click on the row containing the message that you would like to respond to.

	FOIP Request Number ↓ ⌄	Other Party ⌄	AESO Team ⌄	Subject ⌄	Created By ⌄	Modified On ↓ ⌄
	2030-A-001	TST-Carlo gaerlan2	FOIP Analysts	Clarification needed	TST-Carlo gaerlan2	5/18/2021 7:42 PM
	2030-A-001	TST-Carlo gaerlan2	FOIP Analysts	Receipt of FOIP Request 2030-A-0...	TST-Carlo gaerlan1	5/18/2021 3:20 PM

2. In the Message, scroll down to the Timeline section and click on Enter a note…

Timeline

Search timeline

Enter a note…

TG Note modified by TST-Carlo gaerlan1   Please see attached file in the Documents tab. Thanks, FOIP Analyst
5/18/2021 3:51 PM

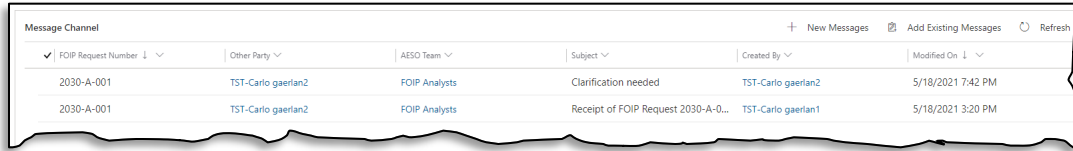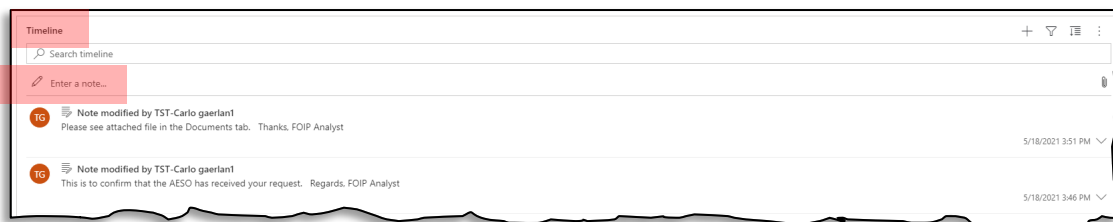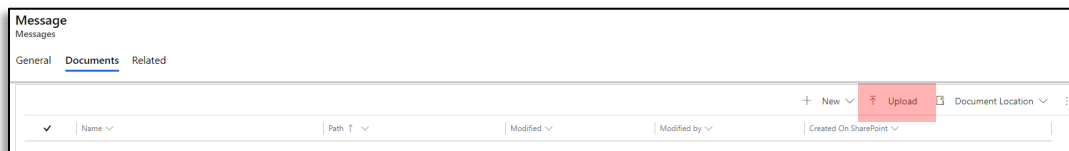TG Note modified by TST-Carlo gaerlan1   This is to confirm that the AESO has received your request. Regards, FOIP Analyst
5/18/2021 3:46 PM

3. Add a title in the "Title" text box if needed or just type your message directly in the "Enter text…" text box. Then click the Add note button.

4. The AESO FOIP Analyst will be notified via email of your response.

Action 5: Upload a document in a Message.

1. Inside the Message that you would like to upload a document to, go to the *Documents* tab.

Message
Messages

General   Documents   Related

+ New ⌄   ⬆ Upload   Document Location ⌄

	Name ⌄	Path ↑ ⌄	Modified ⌄	Modified by ⌄	Created On SharePoint ⌄

2. Click on the *Upload* button. In the *Upload Documents* window, click on *Choose File* and locate the document you wish to upload. Then click on OK.
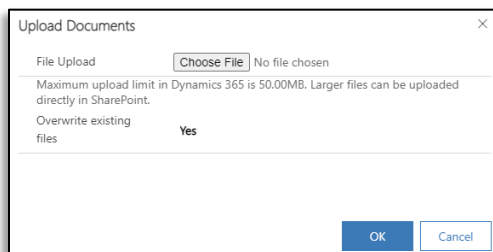
Upload Documents   ✕

File Upload   Choose File   No file chosen

Maximum upload limit in Dynamics 365 is 50.00MB. Larger files can be uploaded directly in SharePoint.

Overwrite existing   **Yes**
files

OK   Cancel

Note: If you upload a document with the same name as a previous upload *within the same message*, you will overwrite the existing file. In order to properly capture different versions of documents, it is recommended that you save the document under a different name before uploading.

# Download all FOIP related data and documents

Purpose:

The steps will show you how to download all data and documents of a FOIP request into a ZIP file. Although bulk download of data and documents can be done at any point in time during the course of the FOIP request, downloading all related data and documents is most useful after the AESO's official response to the FOIP request has been issued.

Precondition(s):

1. The status of the FOIP request is in progress or has been responded to.

Step 1: Read messages from the AESO FOIP Analyst.

1. Open the FOIP request that you would like to download.

2. On the top menu bar, select *Create ZIP*.
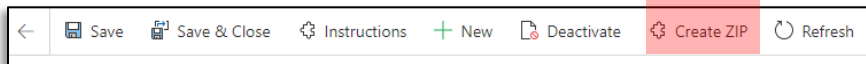
3. The ZIP file will be saved in the *ZIP File* tab.
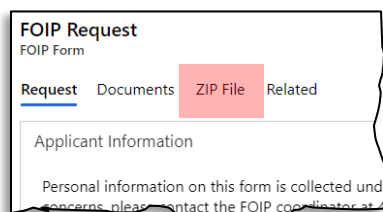
4. Simply click on the ZIP file that appears in the list and it will download the file to your computer.

Note: After receiving the final response to your FOIP request from the AESO FOIP Office, you will have 60 days from that date to download all documents into a ZIP file. After the 60 days, the specific FOIP request will not appear in your list of FOIP requests.

Appendix A – Further Guidance on Completing and Submitting the FOIP Request Form

The following is to provide further guidance on filling out the FOIP Request form.

What records are in the custody and control of the AESO?

If you need help to find out what records the AESO has, please contact the AESO FOIP Coordinator at:

> AESO FOIP Office
> Calgary Place
> 2500, 330 - 5th Ave SW
> Calgary, AB T2P 0L4
>
> Telephone: 403-539-2528
> Fax number: 403-264-6225
> Email: privacy@aeso.ca

Request Form Section 1: Applicant Information

In the Applicant field, your first name, last name and other contact information will be auto-populated with the information you submitted when you signed up. If you need to change your contact information in the FOIP Portal, please contact the AESO FOIP Office.

In the Company field, enter the name of the company or organization you are representing, if applicable. As this is a mandatory field, enter "NA" (not applicable) so that you do not get an error message when attempting to submit the form.

Request Form Section 2: Request Information

What kind of information do you want to access? Select *general* or *personal* information.

General information is information requested about a third party other than personal information (see below). For general information requests, there is an initial fee of $25.00.

- Please make the cheque payable to the Alberta Electric System Operator or AESO. Typically, the AESO accepts payment by cheque; however, if you prefer to make a payment online, please contact the AESO FOIP Coordinator at 403-539-2528 or by email at privacy@aeso.ca.

- The AESO provides you with an estimate of any additional costs before processing begins.

- If the total cost of processing your request is more than $150, you will be notified and given options to proceed. Processing will cease until fees have been resolved.

- The records are provided when the fee is paid in full.

Personal information is your own personal information or the personal information of an individual you are entitled to represent.

- You must provide proof of your identity before records containing your personal information are released to you.

- If you are requesting records for another person, you must provide proof that you have authority to act for that person (e.g. guardianship or trusteeship order, power of attorney).

- There is no initial fee for accessing your own personal information.

- If the allowable cost of processing is more than $10, you will be notified of the fee and given options to proceed. Processing will cease until fees have been resolved.

Continuing request: This is a single request that is processed more than once at predetermined time intervals over a period of up to 2 years.

- Contact the AESO FOIP Coordinator if you are making a continuing request.

- The initial fee is $50.00.

- You must pay any additional costs as the information becomes available.

Do you want to receive a copy of the record *or* examine the record?

You may ask for a copy of the record(s) or ask to examine the record(s).

Request Form Section 3: What records do you want to access?

Be as specific as possible in describing the records. If you need more space, you can continue your description in a separate document and upload it as part of your FOIP Portal submission following the instructions provided in this guide.

If requesting your own personal information, give:

- Your full name.

- Any other names that you have previously used.

- Any identifying number that relates to the records, such as your employee number, case number or other identification number.

If requesting another person's information, give:

- The person's full name.

- Any other name that person may have used on the records.

- Any known identifying numbers for the person. If you're requesting records for another person, you will have to provide proof that you have authority to act for that person (e.g., Power of Attorney documents).

Request Form Section 4: What is the time period of the records?

Choose the *Record Begin Date* and *Record End Date* to establish the date range for the records you want to access. For example, if you choose January 1, 2017 as the begin date and August 31, 2017 as the end date, records falling within that 8-month time period will be searched.

[Back to Top](#)