Training Topics

- Introduction to Agency Agreements
- How to create an Agency Agreement
- How to approve an Agency Agreement
- How to terminate an Agency Agreement
- Non-NFG Entity Agreement
- Account security after the creation and agreement to an Agency Agreement
Introduction to Agency Agreements
Introduction to Agency Agreements

- An Agent is defined as a third party that performs tasks on behalf of another company, such as:
  - Entering readings and/or volumes
  - Viewing readings and/or volumes
  - Viewing/printing gas production reports
  - Viewing/printing allocation statements

- An Agency Agreement may only be created by the Principal Producer
  - The principal producer is the company hiring the agent to perform tasks on their behalf

- An Agency Agreement must be electronically approved by both parties (Principal Producer and Agent) to be fully executed

- An Agency Agreement may be terminated at any time by either the Principal Producer or the Agent

- After the Agency Agreement has been executed all users for the Agent will have access to the Principal Producer’s account if designated so by the Security Administrator (SA) for the Agent
  - The Agency Agreement is between companies and not individuals
  - National Fuel will not be a party to the Agency Agreement

- A Principal Producer may designate as many Agents as they desire by completing an Agency Agreement for each individual company

Note: if the Principal Producer wishes to form an Agency Agreement with a company that does not have an assigned account with National Fuel, the Agent company will need to contact a member of the Gas Measurement department (NFG_GM@natfuel.com) to complete a Security Administrator Request Form and System License Agreement. Once these forms are reviewed and approved by the National Fuel Legal department, the Agent company will be provided an entity number and web access. At that time the Principal Producer may create the Agency Agreement.
How to create an Agency Agreement
How to create an Agency Agreement

This will be the home screen that appears after you log-in to GM-LP Accounting system:

Select ‘Measurement Activities’ to expand the menu option

Once you have expanded the Measurement Activities menu the following options will be displayed:

Select ‘Security Administration’ to expand the menu option

Once you have expanded the Security Administration menu the following options will be displayed:

All blue text represents a link that can be used for navigation
To create/maintain an Agency Agreement select ‘Agency’ from the Security Administration menu.

Select ‘Agency’ to expand the menu option.

Once you have expanded the Agency menu the following options are displayed:

Select ‘Create Agency Agreement’ to get started.
How to create an Agency Agreement

Once you have selected the 'Create Agency Agreement' option the following Agency Agreement screen will be displayed:

To get started enter your Principal Producer ID (a.k.a. Entity #)

If you are unsure of your Producer ID - Simply select the magnifying glass to have all accounts displayed that you are an SA for.

Note: you may only create an Agency Agreement for accounts you have been designated an SA for.
How to create an Agency Agreement

Once you have selected the ‘Create Agency Agreement’ option the following Agency Agreement screen will be displayed:

The Agreement Functions let the system know what access to provide the Agent for your account.

To assign Agreement Functions select the drop down arrow to display options.

If you wish to authorize more than one Agreement Function under the Agency Agreement, select the ‘+’ option to add additional rows. If necessary, select the ‘-’ option to remove an assigned function.

Agreement Functions for Enter readings and/or volumes and View readings and/or volumes may be assigned for all meters or individual meters.

Once you have entered/selected the Principal Producer ID you will be required to complete the following fields prior to submitting the Agency Agreement for approval:
- Agent Producer ID (A.K.A. Entity # to be provided by the Agent)
- Select Agreement Functions to assign

Comments entered here will be displayed for the Agent’s Review.

If you wish to assign all Agreement Functions under the Agency Agreement you may select the ‘Add All Roles’ button.
To restrict the Agent to a specific meter for the ‘Enter Readings and/or Volumes’ and ‘View Readings and/or Volumes’ roles:

1. Uncheck the ‘All Meters?’ box

2. In the ‘Type’ drop down box select ‘Meter’

3. Select the magnifying glass for the ‘Key’ field to generate a pop-up of all active meters for the Principal Producer’s account that are available to be assigned. Select the desired meter to assign.

4. To assign multiple meters (but not ALL meters), select the ‘+’ to add a new row and repeat steps 1-4 as necessary.

Note: To remove a meter select the ‘-’ sign next to the meter number.
To create an Agency Agreement:

1. Uncheck the ‘All Meters?’ box.
2. In the ‘Type’ drop down box select ‘All Meters for Company’.
3. Select the magnifying glass for the ‘Key’ field to generate a pop-up of all Companies that the Principal Producer’s account has meters with that are available to be assigned. Select the desired Company to assign.
4. To assign multiple companies or meters, select the ‘+’ to add a new row and repeat steps 1-4 as necessary.

Note: To remove a company or meter select the ‘-’ sign next to the meter number.

Note: This feature may not apply to all Principal Producer accounts as meters may all be within one National Fuel business unit, such as Distribution, Supply, or Empire.
Once you have completed all of the required fields the **Agency Agreement** must be submitted and approved:

The Principal Producer may approve the Agency Agreement before or after the Agent by selecting the approve button. If the Principal Producer selects approve before the Agent, all Agreement Functions will be locked for editing by the Agent.

The Principal Producer may also terminate the Agency Agreement at any time by selecting the terminate button.

Once you have selected the ‘Submit’ button the system will automatically send an email to the SA's of the Agent informing them that there is an Agency Agreement pending approval.

This area shows the status of the Agency Agreement and the Agreement ID for tracking.
How to approve an Agency Agreement
How to approve an Agency Agreement

Once a notification is received that an Agency Agreement has been created both parties can access the agreement via the following steps:

From the Security Administration menu select the Agency option and then select Maintain Agency Agreement.

Note: Create Agency Agreement will only be used for the initial creation. All other functions related to the agreement will be accessed through the Maintain Agency Agreement option.

Once you have selected the 'Maintain Agency Agreement' option the following screen will be displayed:

Any of the following search criteria may be used to access all Agency Agreements the company has been involved with (active and inactive).

- If you know the Agreement ID enter it here to pull up that specific agreement
- To see all agreements for a specific Principal Producer enter the entity # here
How to approve an Agency Agreement

Once an Agency Agreement is selected the Agency Agreement Maintenance screen will display to allow changes, approval, or termination:

The agreement will display as created by the Principal Producer.

Note: An Agent may make changes to the Agreement Functions if the Principal Producer has not approved and thereby agreed to the agreement yet.

Once the comments and Agreement Functions have been reviewed, select the ‘Approve’ button to push the agreement back to the other party or the ‘Terminate’ button to cancel the agreement.

Note: The applicable company name entering into the agreement will populate in this message. The agreement is not with National Fuel.

This screen shows that an Agent can make changes to the Agreement Functions prior to approving.
How to approve an Agency Agreement

Once an Agency Agreement is selected the **Agency Agreement Maintenance** screen will display to allow changes, approval, or termination:

While the Agency Agreement is waiting approval by the parties the status will be reflected noting the individual who approved the agreement.

Note: Only an SA may approve an Agency Agreement and all agreements must be created and maintained electronically as described in this training.
Once an Agency Agreement is selected the **Agency Agreement Maintenance** screen will display to allow changes, approval, or termination:

![Agency Agreement Maintenance Screen]

Select to print the terms of the agreement

Once the Agency Agreement status is ‘Approved’ the Agency Agreement will be generated by the system and available for print. The system will populate the ‘Principal’ and ‘Agent’ names along with contact information and the names of the SAs who electronically approved the agreement.

**Note:** This is a standard NFG Form Agency Agreement that is entered into and can be printed from this page by selecting the ‘**Print Agreement**’ button.
How to terminate an Agency Agreement
An Agency Agreement may be terminated by either a Principal Producer or Agent at any time via the following steps:

1. Select the ‘Terminate’ button and then select ‘yes’ to proceed with the termination when the pop-up appears.

The agreement status will change once the termination has taken place and the system will remove all applicable access.
Non-NFG Entity Agreement
What is a Non-NFG Entity Agreement?

Once you have selected the ‘Create Agency Agreement’ option the following Agency Agreement screen will be displayed:

Note: The Non-NFG Entity Agreement must provide that the Agent will abide by the terms of the NFG tariff. As well, it must be capable of termination on notice. Once approved the Principal Producer must assign the functionality desired to the Agent as provided in the earlier slides (see the “How to create an Agency Agreement” section).

If a different form of agreement from the NFG Form Agency Agreement will be used between the Principal Producer and the Agent, the ‘Non-NFG Entity Agreement’ box should be checked. This agreement will need to be submitted to National Fuel for review prior to the Agency Agreement being executed. Please send any such agreements to NF_GM@natfuel.com.
What is a Non-NFG Entity Agreement?

Once you have selected the ‘Create Agency Agreement’ option the following Agency Agreement screen will be displayed:

If you determine that the Non-NFG Entity Agreement does apply to the Agency Agreement you are creating select the box. A pop-up message will display providing additional instructions to execute the agreement.

Note: There is an additional level of approval required for an Agency Agreement that includes a Non-NFG Entity Agreement. Once the Legal department of National Fuel has reviewed the Non-NFG Entity Agreement, a National Fuel employee will approve the Agency Agreement. Only after the National Fuel employee approves the Agency Agreement will it be fully executed.
Account security after the creation and agreement to an Agency Agreement
Account security after the execution of an Agency Agreement

Once an Agency Agreement has been completed and agreed to by both parties the following access changes will take effect automatically:

Access the Function Maintenance screen via the Maintain Users menu to view all accounts available for roles to be assigned (see the Security Administrator (SA) Training for instruction on how to assign roles)

The SAs and users for the Agent will be provided with access to the Principal Producers account as specified in the Agency Agreement.

This access will only be functional when the SA assigns roles for the Principal Producers account. If the roles are not assigned users will not see a change in access.

Note: As specified in the Agency Agreement, the Agent was only to be provided access to one specific meter. The following shows that the system has restricted access to the specific meter as desired:
End.

Still have questions?
Contact Bonnie Confer, GM System Administrator,
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