Railroad Commission of Texas State Tracking and Reporting System (LoneSTAR)

Release 1 Software Design

User Guide

W-3X Application for an Extension of Deadline for Plugging a Well - Individual

Table of Contents

COURSE OVERVIEW

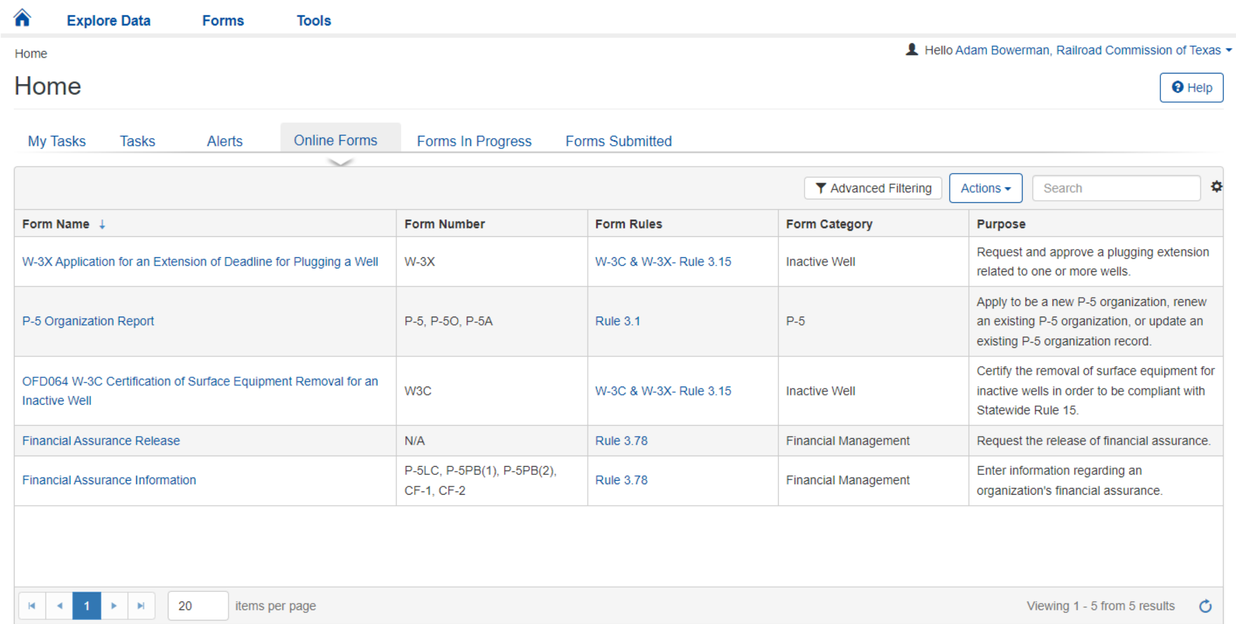
Course Description

This guide can be used to submit a W-3X Application for an Extension of Deadline for Plugging a Well form in LoneSTAR.

1.1 Launching the Form

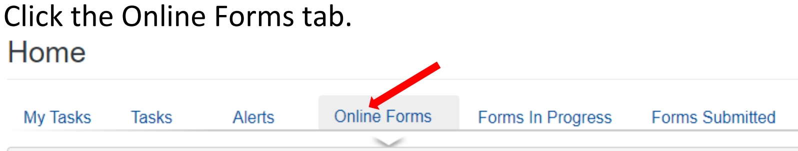
1.1.1 Key Points

- Users with sufficient security roles can launch the form.



Form Name	Form Number	Form Rules	Form Category	Purpose
W-3X Application for an Extension of Deadline for Plugging a Well	W-3X	W-3C & W-3X- Rule 3.15	Inactive Well	Request and approve a plugging extension related to one or more wells.
P-5 Organization Report	P-5, P-5O, P-5A	Rule 3.1	P-5	Apply to be a new P-5 organization, renew an existing P-5 organization, or update an existing P-5 organization record.
OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well	W3C	W-3C & W-3X- Rule 3.15	Inactive Well	Certify the removal of surface equipment for inactive wells in order to be compliant with Statewide Rule 15.
Financial Assurance Release	N/A	Rule 3.78	Financial Management	Request the release of financial assurance.
Financial Assurance Information	P-5LC, P-5PB(1), P-5PB(2), CF-1, CF-2	Rule 3.78	Financial Management	Enter information regarding an organization's financial assurance.

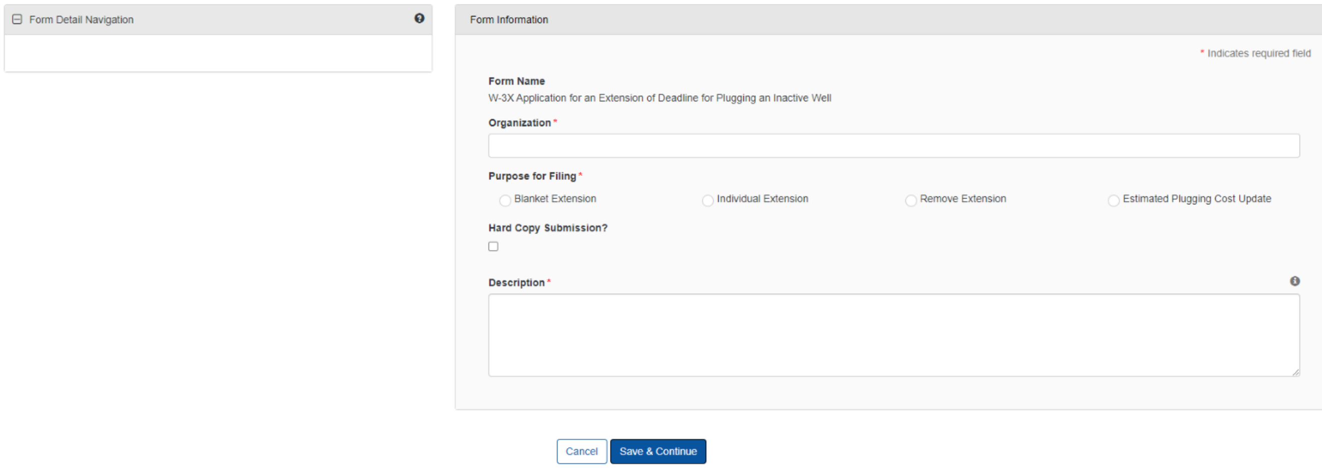
1.1.2 Steps to launch the form

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page.	
2.	Click the Online Forms tab.  	
3.	Select the W-3X Application for an Extension of Deadline for Plugging a Well form name.	

1.2 Form Information Step

1.2.1 Key Points

- Learn how to enter information on the form information step and create a new form instance.



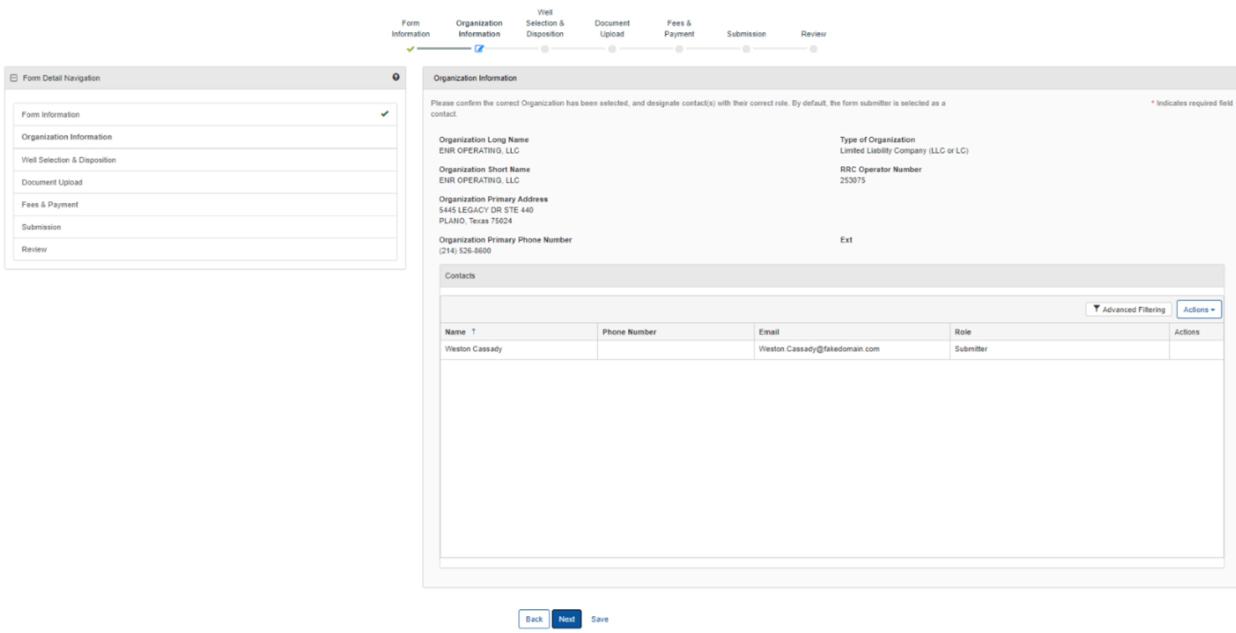
1.2.2 Steps to complete the Form Information step

Step	Action	Required Fields
1.	Select the Organization you are submitting the W-3X on behalf of. Form Name W-3X Application for an Extension of Deadline for Plugging an Inactive Well Organization * ENR OPERATING, LLC (253075)	
2.	Select the purpose of the W-3X being submitted. For this example, select Individual Extension. Purpose for Filing * Blanket Extension Individual Extension Remove Extension Estimated Plugging Cost Update Note: Each W-3X can only have one Purpose for Filing.	
3.	Do not select the Hard Copy Submission? Checkbox. Hard Copy Submission? Note: The purpose of this is to indicate an Operator sent a W-3X to the commission and the Internal User is now submitting the form on behalf of the Operator.	
4.	Enter a Description that will allow you to easily locate this particular form submission in the future. Description *	
5.	Click Save & Continue Cancel Save & Continue Note: At this point, this is now considered a form instance in LoneSTAR	

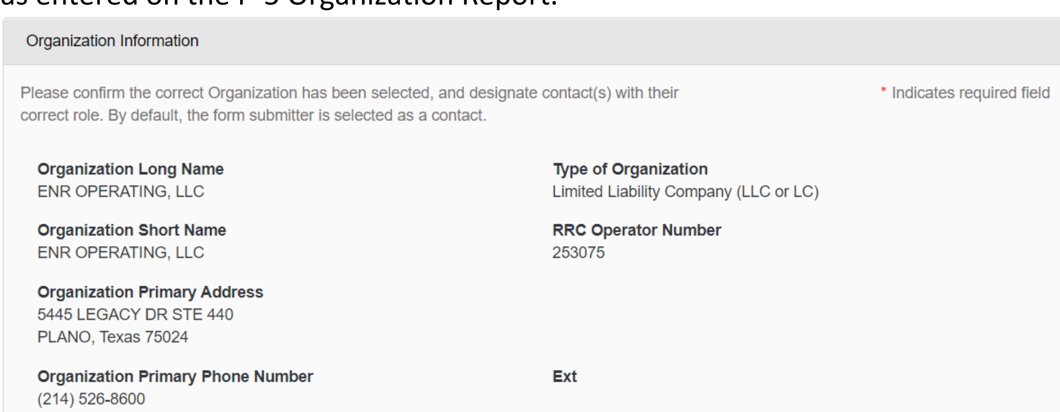
1.3 Organization Information Step

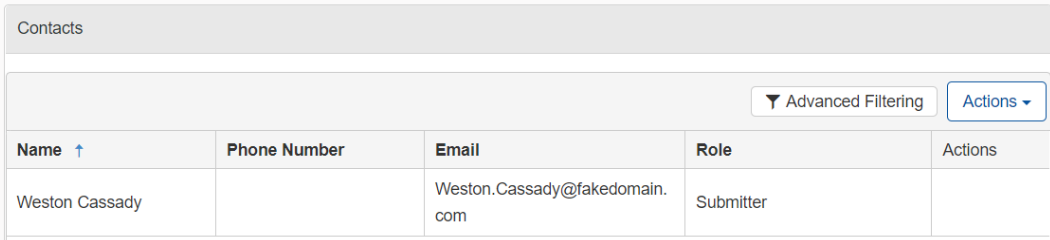
1.3.1 Key Points

- Learn how to confirm Organization Information.



1.3.2 Steps to complete the Organization Information step

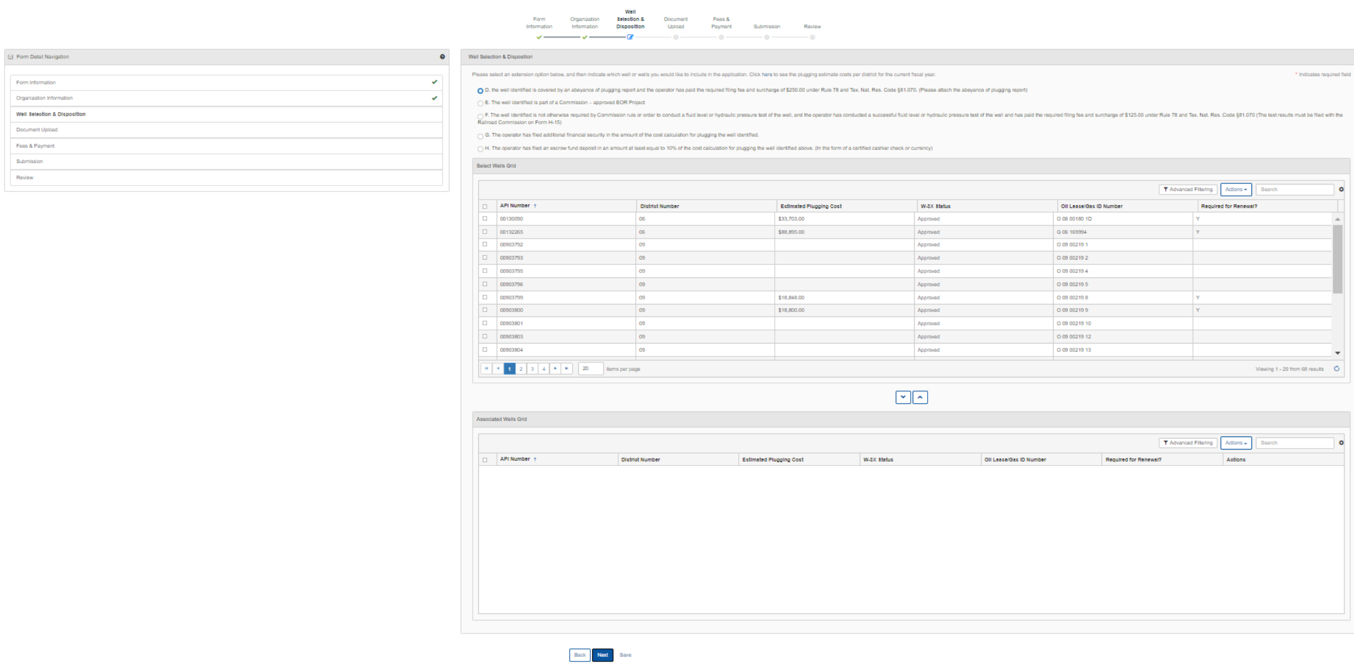
<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>LoneSTAR will present the Organization Information step pre-populated with information based on the most recently approved P-5 Organization Report for the associated to Organization.</td><td></td></tr>
<tr><td>2.</td><td>The first information presented includes the information for the organization itself as entered on the P-5 Organization Report.

</td><td></td></tr>
<tr><td>3.</td><td>Below, the grid displays users who are associated to the form submission.</td><td></td></tr>
</table>

	 Note: A user with a Role of Submitter is automatically added as the user who is currently in context of the online form.	
4.	To navigate to the next step, click “Next”. 	

1.4 Well Selection and Disposition Step

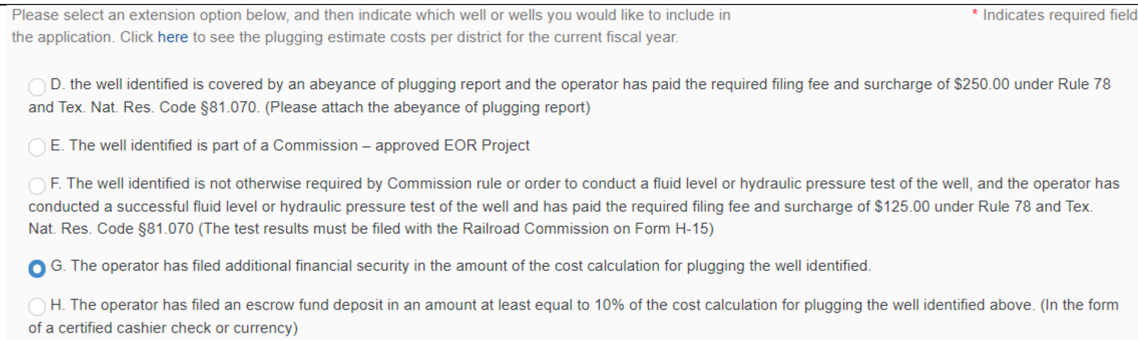
1.4.1 Key Points

- Learn to select the W-3X Option and verify wells to complete the step.

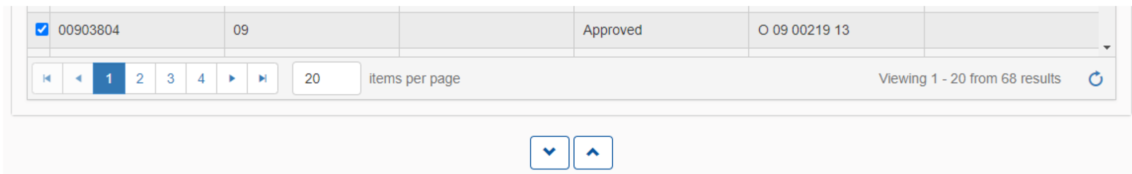


1.4.2 Steps to complete the Wells step

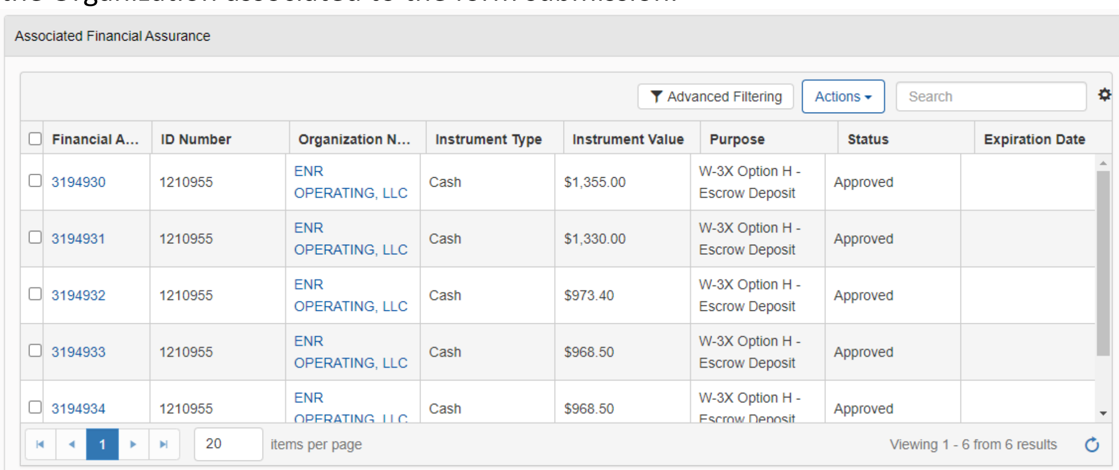
Step	Action	Required Fields
1.	This step will display differently based on the W-3X Option Selection. For the purpose of this example, we are going to select Option G.	



2. To associate a well to this form submission, select a well by selecting the checkbox next to the Well API from the Select Wells Grid and press the down arrow to move the well to the Associated Well Grid.



3. The Associated Financial Assurance grid will display Financial Assurance(s) associated to the Organization associated to the form submission.



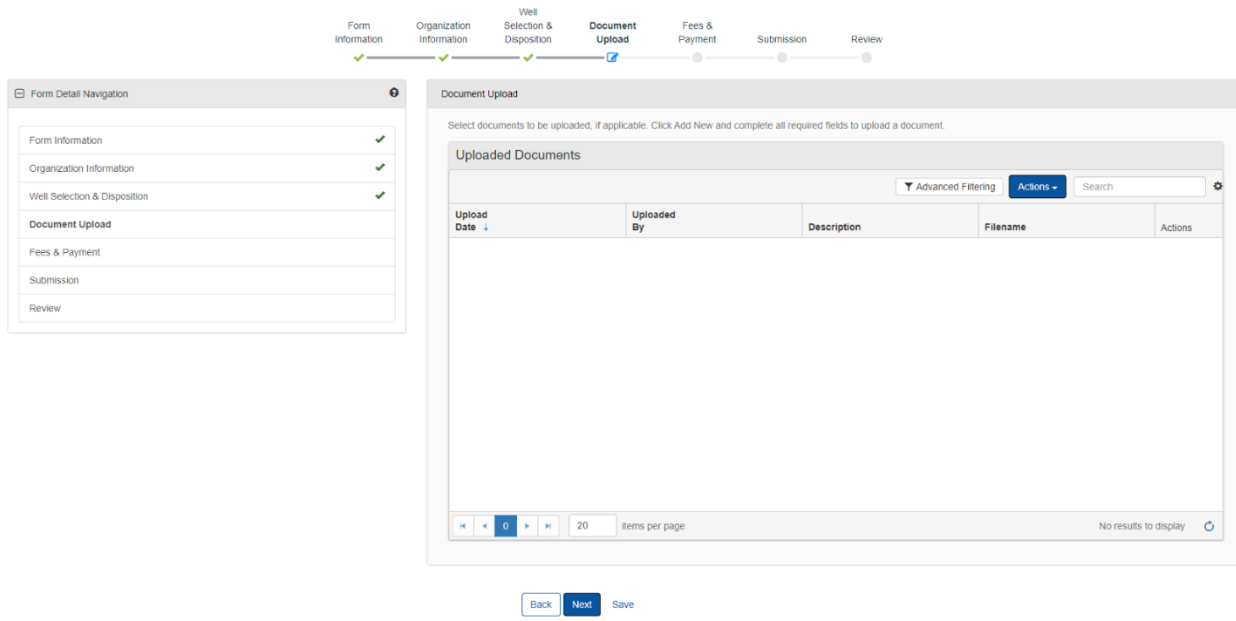
4. At least one Financial Assurance must be associated to the form submission. To do so, select the Chekbox to the left of the Financial Assurance(s) you would like to associate to this form submission.
Note: The Instrument Value of the selected Financial Assurance(s) must equal or exceed the sum of the Estimated Plugging Cost Calculations of the well(s) you choose to associate to the form.

5. To navigate to the next step, click “Next”.

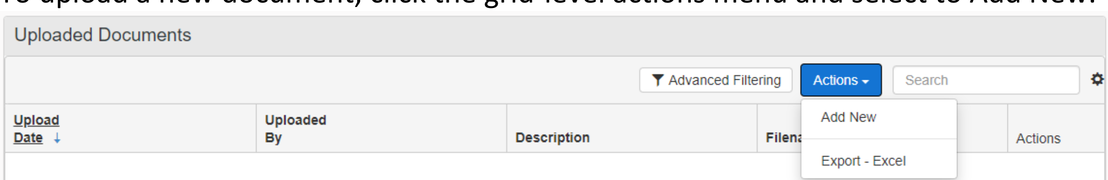
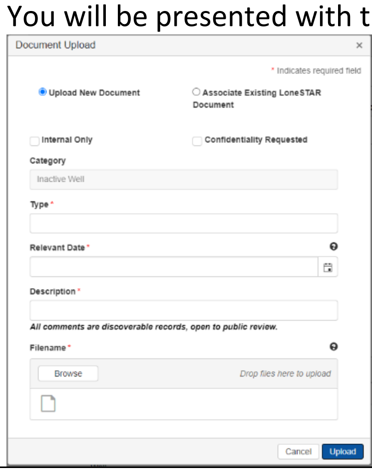
1.5 Document Upload Step

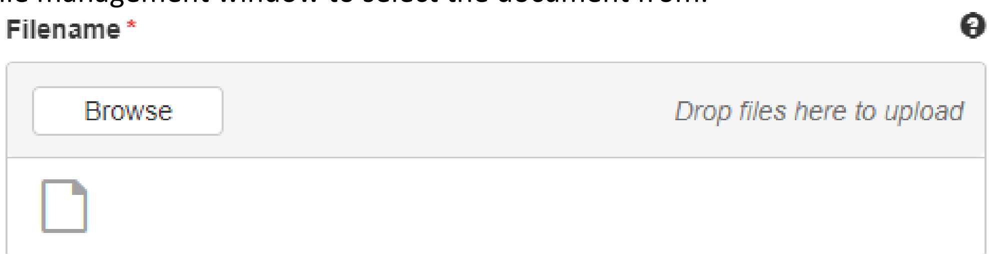
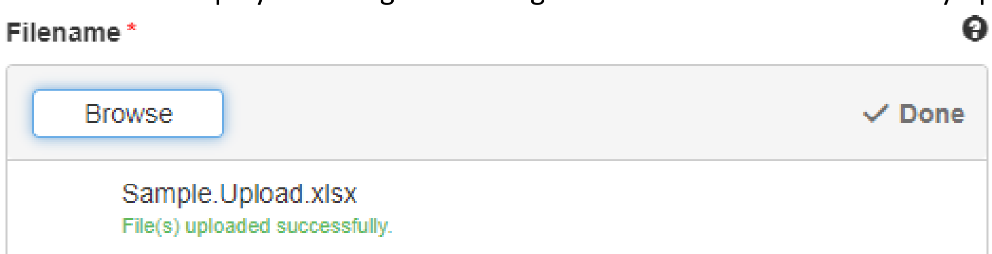
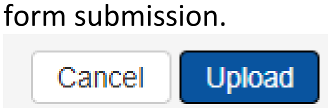
1.5.1 Key Points

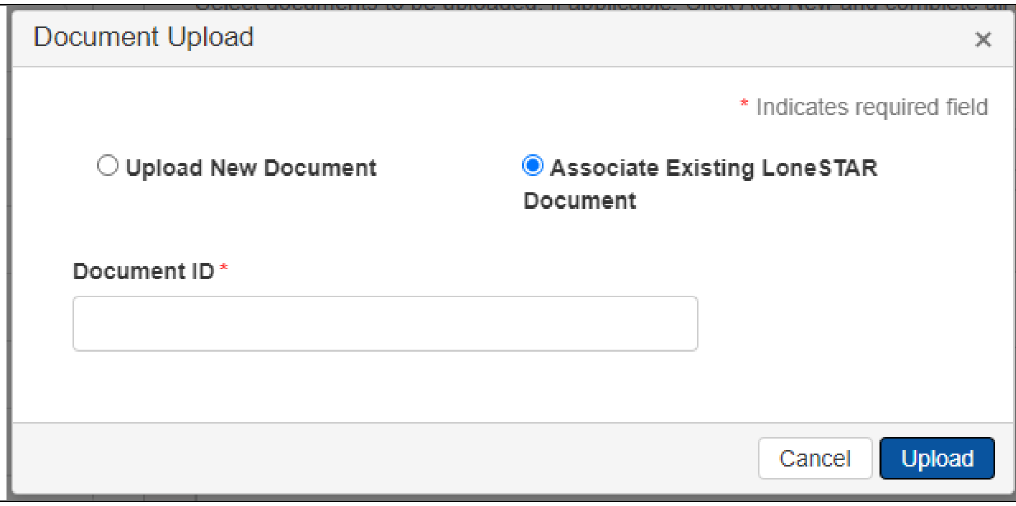
- Learn how to upload various documents to be part of the online form submission.



1.5.2 Steps to complete the Document Upload step

Step	Action	Required Fields
1.	To upload a new document, click the grid-level actions menu and select to Add New. 	
2.	You will be presented with the Document Upload dialog. 	
3.	The user can choose to upload a new document or associate an existing document.	

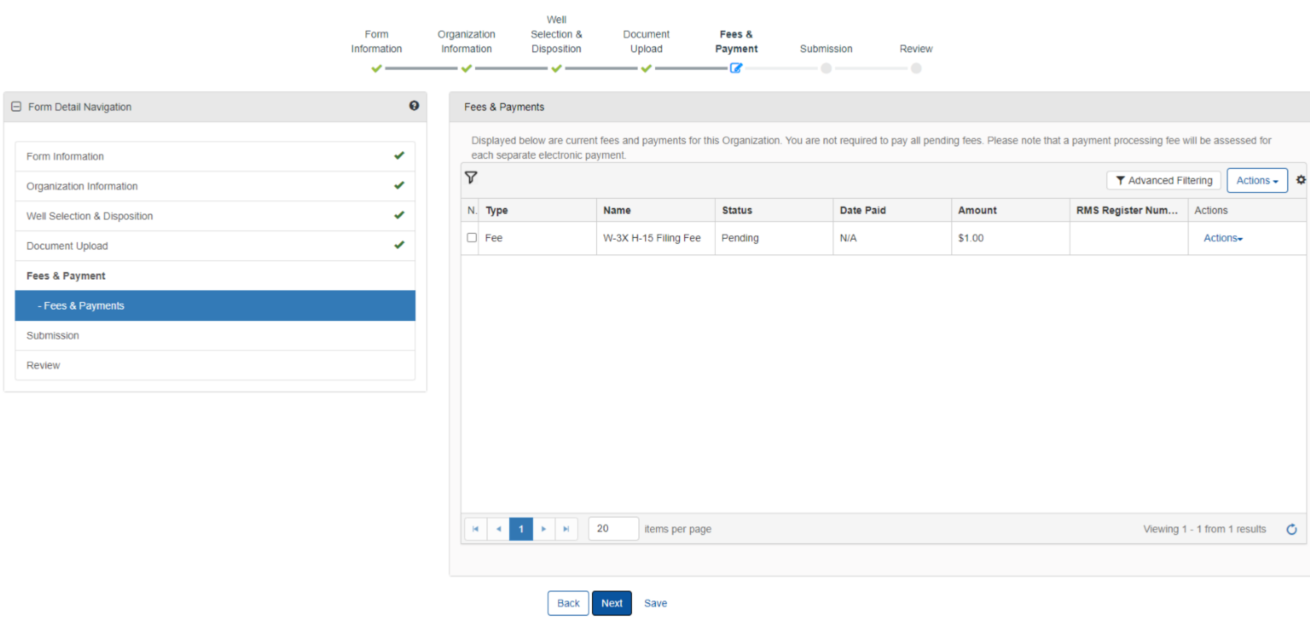
	 Note: To associate an existing document, the document must have been uploaded as part of a previously approved form associated to the organization in context.	
4.	If you choose to upload a new document, you must select the type of document to be associated to the document. For this example, select a type of "Other" set the relevant date to today, and enter a description which can be easily identified later.	
5.	To upload the document itself, select the Browse button. You will be presented with your file management window to select the document from. 	
6.	Double click the document you would like to upload and the selected document will display in the Document Uplaod dialog.	
7.	LoneSTAR will display a message indicating the document was successfully uploaded. 	
8.	Select Upload and the document will now display in the grid and will be associated to the form submission. 	
9.	If instead of uploading a new document, an existing document can be associated.	

		
10.	The Document ID dropdown will display a list of documents that can be associated. Select the desired document and click Upload and the document will now display in the grid and will be associated to the form submission. 	
11.	To navigate to the next step, click “Next”. 	

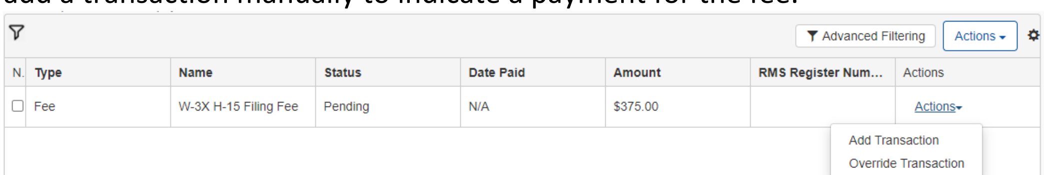
1.6 Fees and Payment

1.6.1 Key Points

- Learn how to complete the Fees & Payments Step.
- Learn how to return to LoneSTAR after interacting with the Payment Portal.



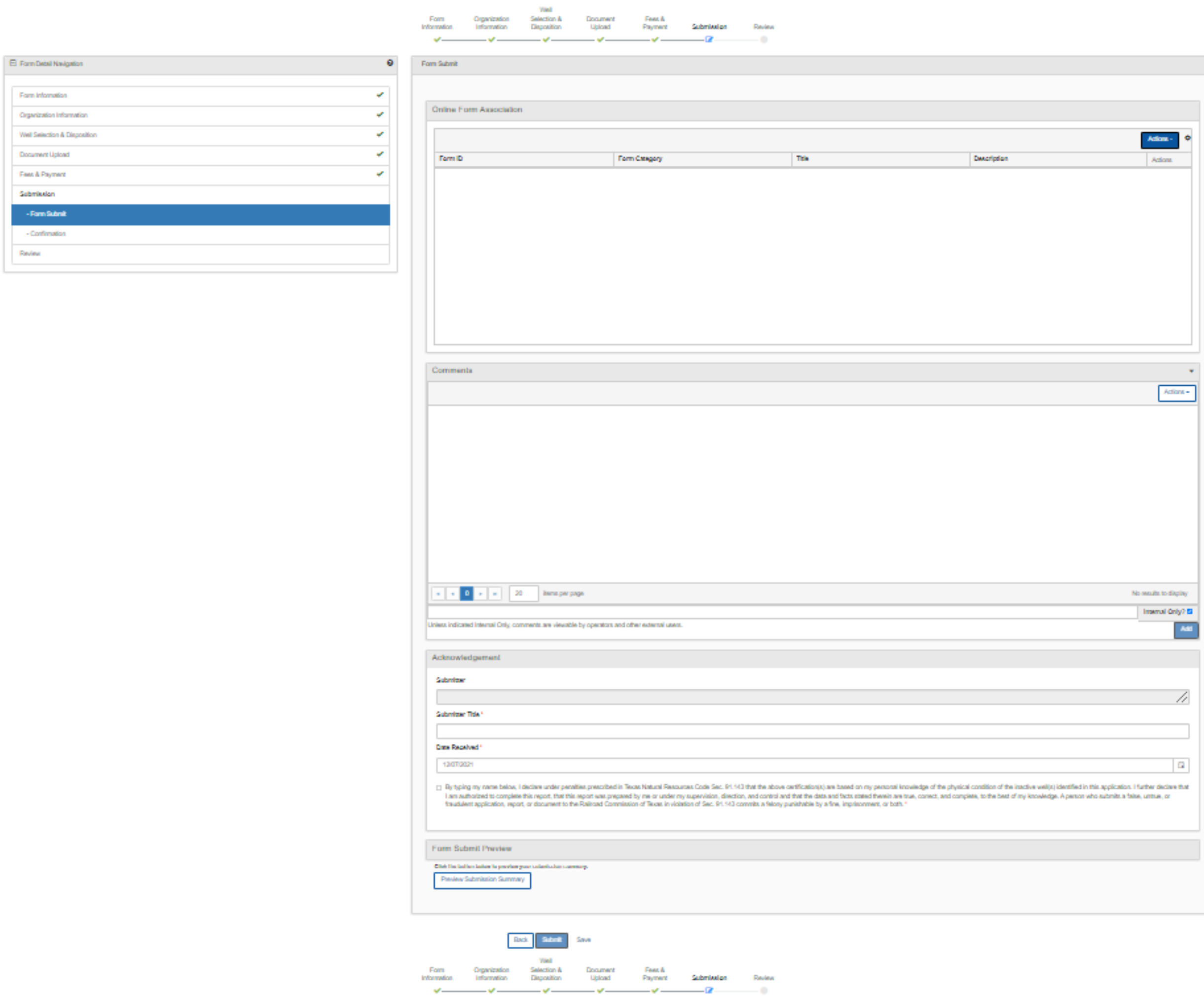
1.6.2 Steps to complete the Fees and Payment step

Step	Action	Required Fields
1.	LoneSTAR will present the user with a grid displaying any required Fees that must be submitted prior to submitting the form.	
2.	In order to make a payment for any required fees, select the row-level actions menu and select “Pay Fee Electronically”.  Note: After selecting this, you will be brought to the Payment Portal. Once you have completed paying for the required fees, select the Return to LoneSTAR link.	
3.	You can verify the status of the payment(s) in the “Status” column to see if the full payment was received by LoneSTAR.	
4.	Additionally, when a fee has a payment made for it, the “Payment Date” column will be populated with the day the fee was paid.	
5.	Internal Users with sufficient security access can select the row-level actions and override the fee so no payment is necessary or can select the row-level actions and add a transaction manually to indicate a payment for the fee. 	
6.	The above steps are replicable for all fees in the grid.	
7.	To navigate to the next step, click “Next”. 	

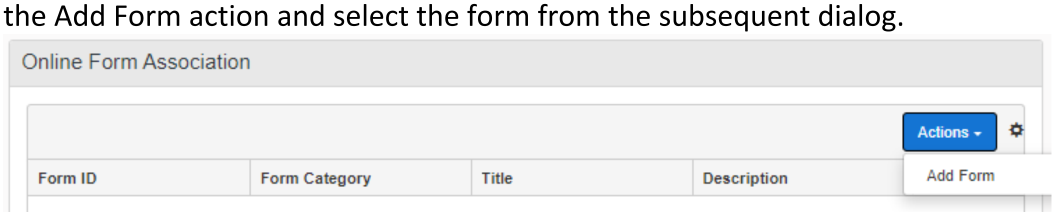
1.7 Form Submit and Confirmation Steps

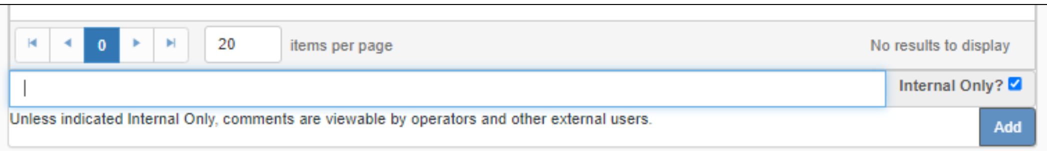
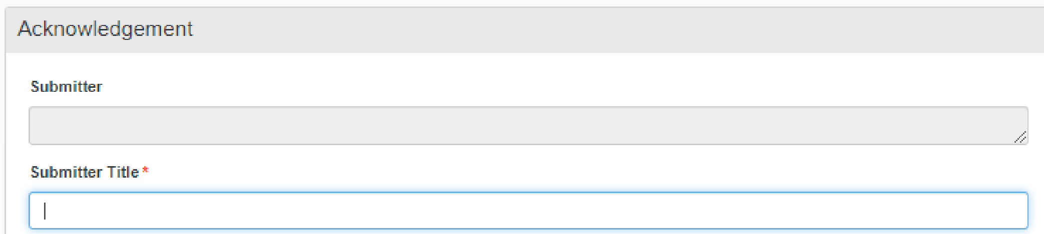
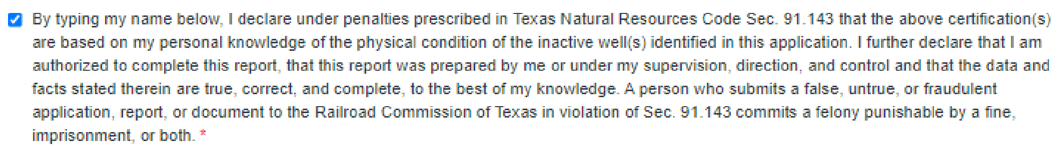
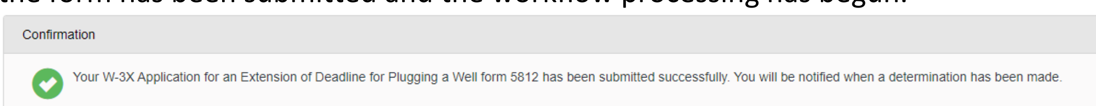
1.7.1 Key Points

- Learn how to submit the form.
- Learn how to view confirmation message.



1.7.2 Steps to complete the Form Submit step

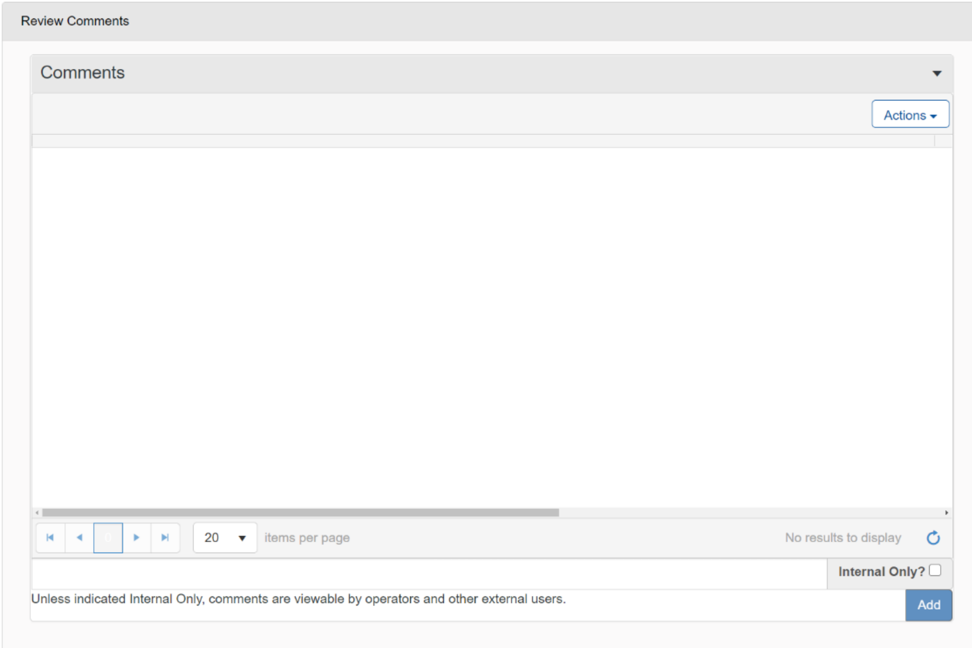
Step	Action	Required Fields
1.	To associate an existing online form to be part of this form submission, you can select the Add Form action and select the form from the subsequent dialog.  	
2.	To add a comment, enter the text of the comment in the comment textbox and press the Add button.	

		
3.	In the Acknowledgement section, the user must enter their submitter title and indicate the date this form was received. 	Submitter Title, Date Received
4.	Select the certification checkbox. 	Certification Checkbox
5.	Select the Submit button to submit the form.  Note: The Submit button is deactivated until all required fields are completed on this step.	
6.	When the form is submitted, the Confirmation message will be displayed to indicate the form has been submitted and the workflow processing has begun.  Note: • Refreshing the page will display if the workflow processing has been completed. • Once the form has been submitted, External Users can no longer edit the form.	

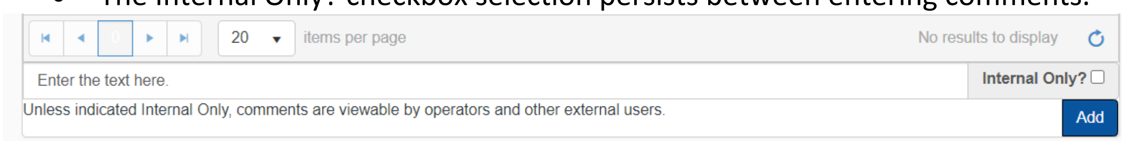
1.8 Review Comments Step

1.8.1 Key Points

- Learn how to complete the Review Comments Step.



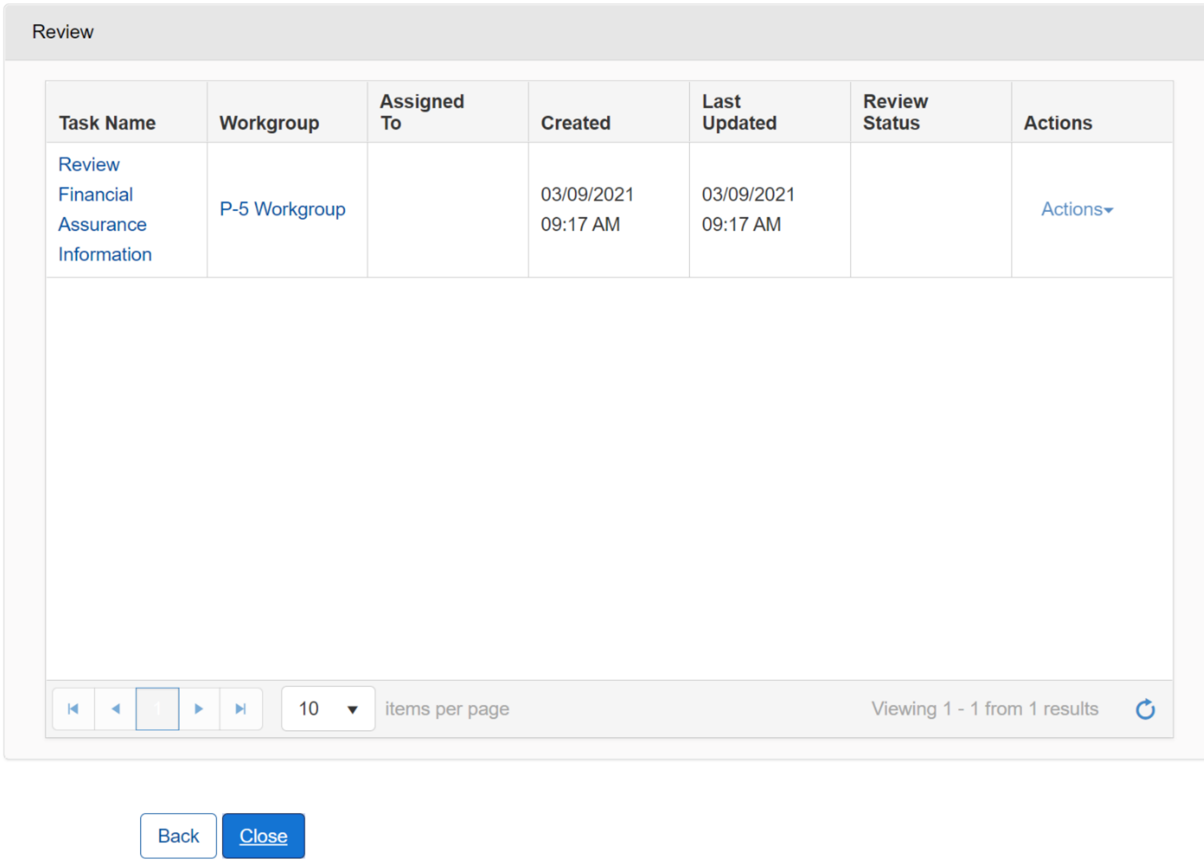
1.8.2 Steps to complete the Review Comments step

Step	Action	Required Fields
1.	To add a comment, enter the text of the comment in the comment textbox, select Internal Only? checkbox, and press the Add button. Note: • Internal Only comments will only be viewable by Internal Users. • The Internal Only? checkbox selection persists between entering comments. 	
2.	To add an externally facing comment, enter the text of the comment in the comment textbox, deselect the Internal Only? checkbox, and press the Add button.	
3.	Select the Next button to proceed to the next step. 	

1.9 Review Step

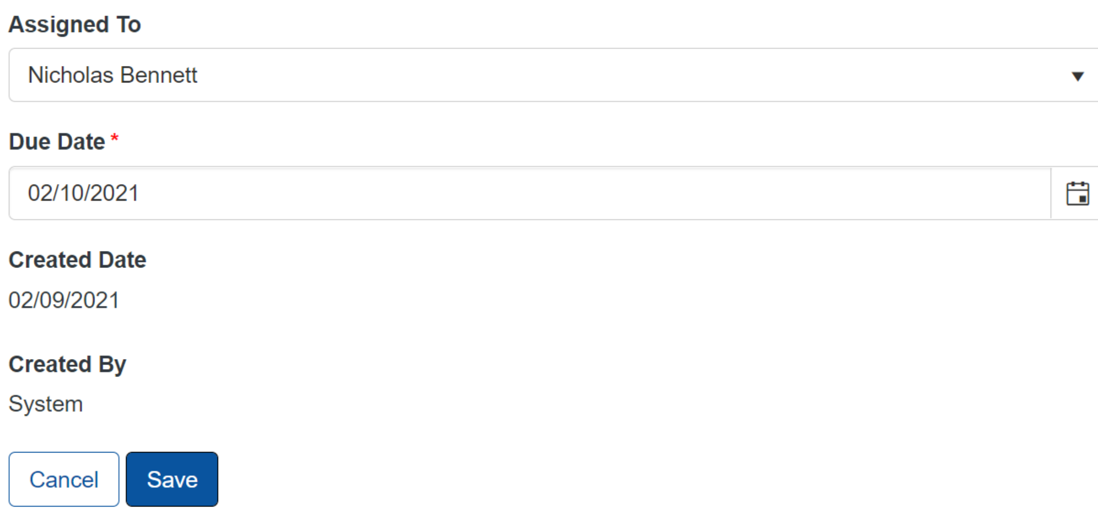
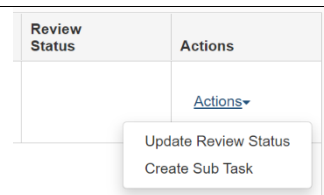
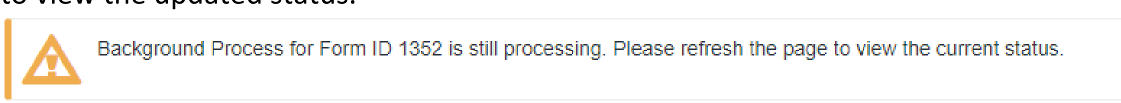
1.9.1 Key Points

- Learn how to complete the Review Step.



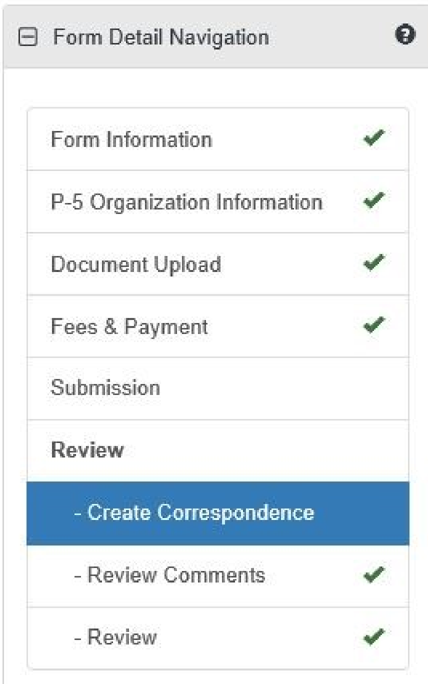
1.9.2 Steps to complete the Review step

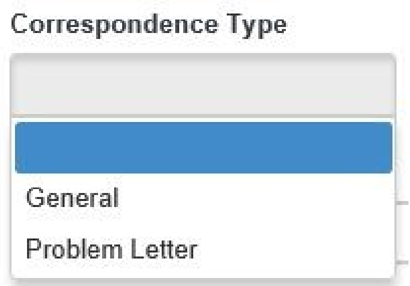
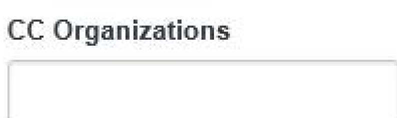
1.	The step is pre-populated with a review task to be completed.	
2.	Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.	

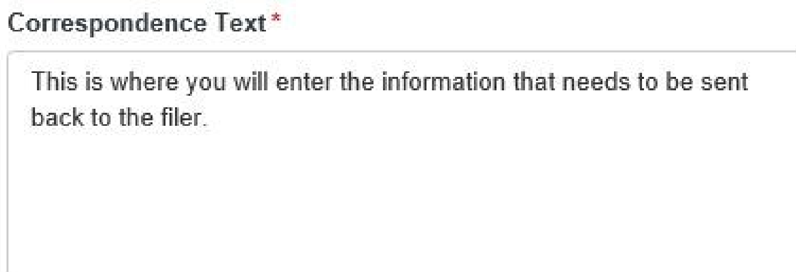
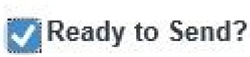
3.	To assign the task to yourself, select the Edit button and in the Assigned To dropdown, select your name from the list, set a Due Date, and select Save.  	Assigned To, Due Date
4.	Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.	
5.	For the purpose of this guide, we are going to choose to Approve the form. To do so, select Update Review Status from the dropdown.  	
6.	Select Pass from the Review Status dropdown and select Save to disposition the task. You will be asked to confirm your selection and select to continue.	Review Status
7.	Workflow processing will begin and you will be notified that you can refresh the page to view the updated status.  	
8.	When workflow processing is complete, repeat the previous steps for any subsequent review tasks, approving each one.	
9.	When the final review task has been approved and workflow processing is complete, the form can be closed.	

1.10 Review Step

1.10.1 Create Correspondence Step

Step	Action	Required Fields
1.	Select the “Review” tab under Form Detail Navigation, and then select “Create Correspondence.”  c	Create Correspondence
2.	For the purpose of this guide, choose “Yes” to Create Correspondence. 	Yes
3.	Choose not to Send via Certified Mail. 	Do not check “Send via Certified Mail?” “Ready to Send” should be left alone until Step 12.

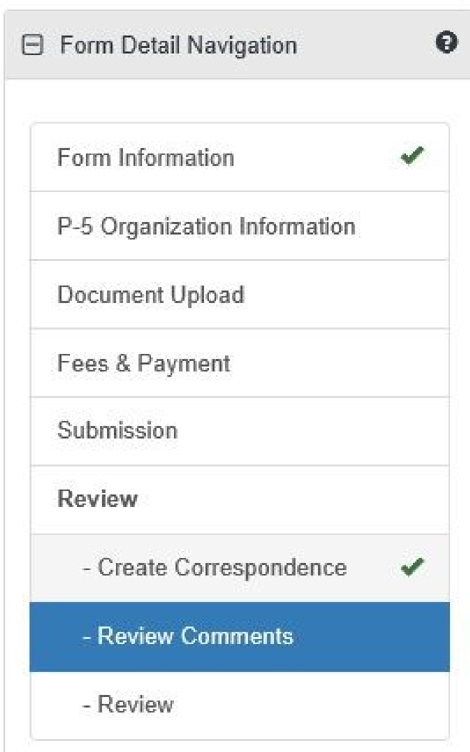
4.	Select the Correspondence Type dropdown to be General.  	
5.	Complete the Subject line to be “Financial Assurance Correspondence.”  	Subject
6.	Complete the Signatory Name field as your preferred name.  	Signatory Name
7.	For the purpose of this example, do not select to CC any additional organizations. (Leave box blank)  	
8.	From the Signatory Department dropdown, select “P-5 Financial Assurance Unit.”  	Signatory Department
9.	For the purpose of this example, do not select to CC any additional people. (Leave box blank)  	

10.	Enter description to be able to identify this document at a later time.  Note: This description is not the title of the correspondence, this is meant to be an easily identifiable description that can be used to locate the correspondence at a later time.	Description
11.	Complete the Correspondence Text field with the desired text to be sent to the Organization as the body of the text. 	Correspondence Text
12.	Navigate back to the top of the step, click the “Ready to Send?” Checkbox.  Note: If this is not selected, the correspondence will not be sent.	
13.	Select the Preview link, this will download a PDF copy of what the correspondence will look like when sent. This link is below the “Correspondence Text” area.  Note: A .pdf will be created, and you will be prompted for the download.	

<table>
<tr><td>14.</td><td>To navigate to the next step, click “Next.”

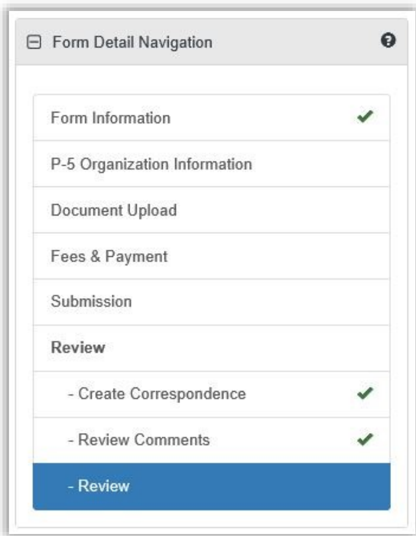
Note:
Once the form is saved, no edits can be made on the page. If corrections are needed, the form will need to be withdrawn and the user will need to start over. It is important to review all work before saving.</td><td></td></tr>
</table>

1.10.2 Review Comments Step

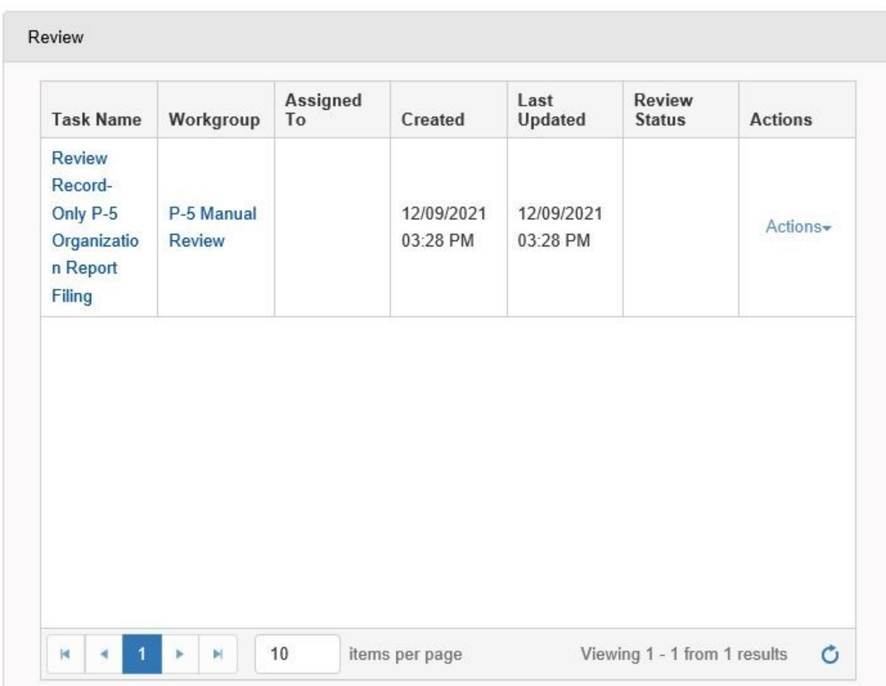
<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>Select the “Review Comments” tab under Form Detail Navigation. Note: It may be necessary to select the “Review” tab under Form Detail Navigation before the “Review Comments” tab can be seen.
</td><td></td></tr>
</table>

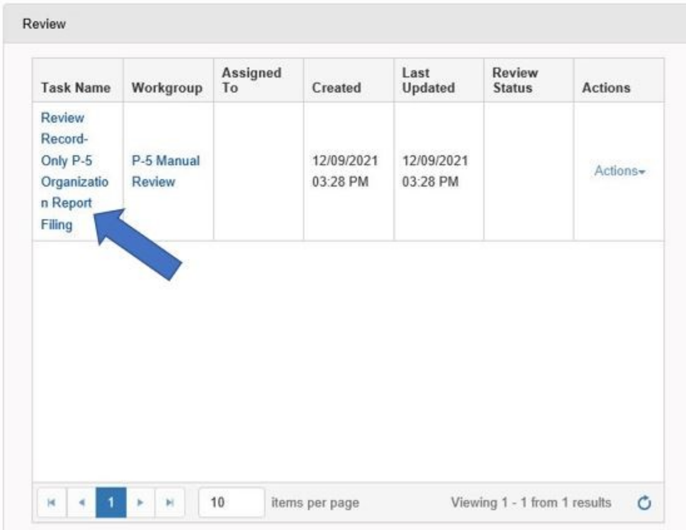
2.	To add a comment, enter the text of the comment in the comment textbox, select Internal Only? Checkbox if needed. Select the Add button to add the comment.  Note: • Internal Only comments will only be viewable by Internal Users. • The Internal Only? checkbox selection persists between entering comments.	
3.	To add an externally facing comment, enter the text of the comment in the comment textbox, deselect the Internal Only? checkbox, and press the Add button. By default, the Internal Only option will not be selected.  	
4.	Select the Next button to proceed to the next step.  	

1.10.3 Review Step

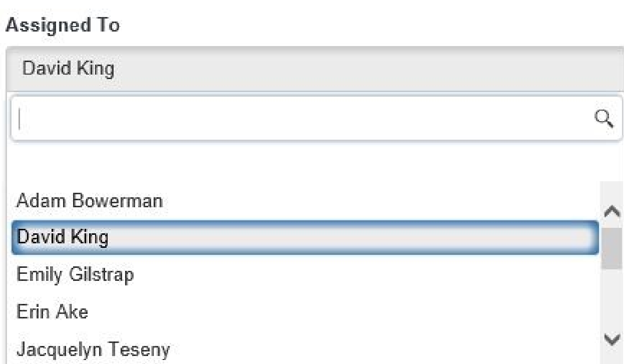


- Not all forms will require a Manual Review. Please see the Form Manual for a validation matrix as reference for conditions which trigger a Manual Review.

<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>The step is pre-populated with a review task to be completed.

</td><td></td></tr>
</table>

<table>
<tr>
<td>2.</td>
<td>Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.


A separate browser tab will open, showing the Task Detail Page.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>a) To assign the task to yourself, select the Edit button at the bottom

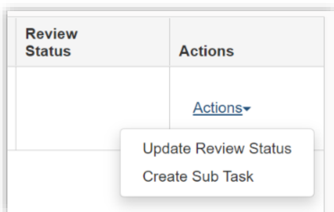
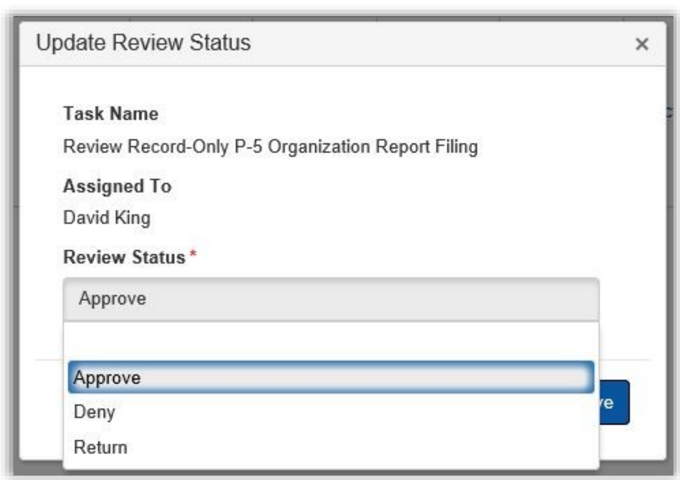

b) In the “Assigned To” dropdown, select your name from the list


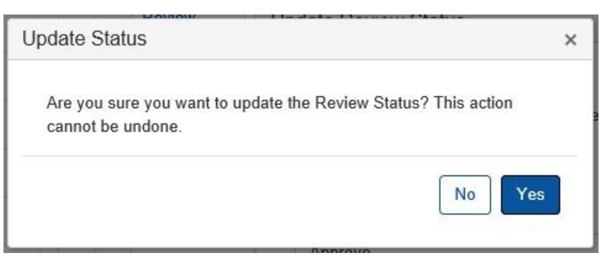
c) Set a Due Date (type manually or use the calendar button at right)

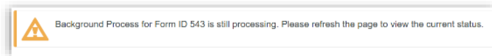

d) Select Save (you will be taken back to the Review Step of the Form)

</td>
<td>Assigned To, Due Date</td>
</tr>
</table>

<table>
<tr><td>4.</td><td>Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.

</td><td></td></tr>
<tr><td>5.</td><td>For the purpose of this guide, we are going to choose to Approve the form. To do so, select “Update Review Status” from the dropdown.

</td><td></td></tr>
<tr><td>6.</td><td>Select “Approve” from the Review Status dropdown and select Save to disposition the task. When asked to confirm, select “Yes” to continue.



</td><td>Review Status</td></tr>
</table>

7.	Workflow processing will begin, and you will be notified that you can refresh the page to view the updated status. 	
8.	Continue the process for the Managerial Workgroup Review task.	
9.	When workflow processing is complete, the P-5 Record Only filing will be updated.	