



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**

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## COURSE OVERVIEW

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### 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.

Home Hello Adam Bowerman, Railroad Commission of Texas

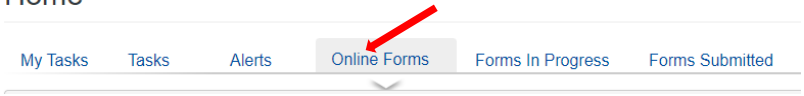
Home Help

My Tasks Tasks Alerts **Online Forms** Forms In Progress Forms Submitted

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.

20 items per page Viewing 1 - 5 from 5 results

### 1.1.2 Steps to launch the form

Step	Action	Required Fields
1.	Navigate to the <b>Internal Landing</b> page.	
2.	Click the Online Forms tab. Home 	
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.

Form Detail Navigation

Form Information \* Indicates required field

**Form Name**  
W-3X Application for an Extension of Deadline for Plugging an Inactive Well

**Organization \***

**Purpose for Filing \***

Blanket Extension    
 Individual Extension    
 Remove Extension    
 Estimated Plugging Cost Update

**Hard Copy Submission?**

**Description \***

### 1.2.2 Steps to complete the Form Information step

Step	Action	Required Fields
1.	<p>Select the Organization you are submitting the W-3X on behalf of.</p> <p><b>Form Name</b> W-3X Application for an Extension of Deadline for Plugging an Inactive Well</p> <p><b>Organization *</b></p> <input type="text" value="ENR OPERATING, LLC (253075)"/>	
2.	<p>Select the purpose of the W-3X being submitted. For this example, select Individual Extension.</p> <p><b>Purpose for Filing *</b></p> <p> <input type="radio"/> Blanket Extension     <input checked="" type="radio"/> Individual Extension     <input type="radio"/> Remove Extension     <input type="radio"/> Estimated Plugging Cost Update </p> <p>Note: Each W-3X can only have one Purpose for Filing.</p>	
3.	<p>Do not select the Hard Copy Submission? Checkbox.</p> <p><b>Hard Copy Submission?</b></p> <input type="checkbox"/> <p>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.</p>	
4.	<p>Enter a Description that will allow you to easily locate this particular form submission in the future.</p> <p><b>Description *</b></p> <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>	
5.	<p>Click Save &amp; Continue</p> <div style="display: flex; justify-content: center; gap: 10px;"> <input type="button" value="Cancel"/> <input type="button" value="Save &amp; Continue"/> </div> <p>Note: At this point, this is now considered a form instance in LoneSTAR</p>	

## 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

Step	Action	Required Fields
1.	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.	
2.	The first information presented includes the information for the organization itself as entered on the P-5 Organization Report. <div data-bbox="232 1413 1295 1812" data-label="Form"> <p>Organization Information</p> <p>Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the form submitter is selected as a contact. * Indicates required field</p> <p><b>Organization Long Name</b> ENR OPERATING, LLC</p> <p><b>Organization Short Name</b> ENR OPERATING, LLC</p> <p><b>Organization Primary Address</b> 5445 LEGACY DR STE 440 PLANO, Texas 75024</p> <p><b>Organization Primary Phone Number</b> (214) 526-8600</p> <p><b>Type of Organization</b> Limited Liability Company (LLC or LC)</p> <p><b>RRC Operator Number</b> 253075</p> <p><b>Ext</b></p> </div>	
3.	Below, the grid displays users who are associated to the form submission.	

	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f2f2f2; padding: 2px;">Contacts</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="text-align: right; margin-bottom: 5px;"> <span>Advanced Filtering</span> <span>Actions</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Name ↑</th> <th style="width: 25%;">Phone Number</th> <th style="width: 25%;">Email</th> <th style="width: 25%;">Role</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td>Weston Cassidy</td> <td></td> <td>Weston.Cassady@fakedomain.com</td> <td>Submitter</td> <td></td> </tr> </tbody> </table> <p style="margin-top: 10px;">Note: A user with a Role of Submitter is automatically added as the user who is currently in context of the online form.</p> </div> </div>	Name ↑	Phone Number	Email	Role	Actions	Weston Cassidy		Weston.Cassady@fakedomain.com	Submitter		
Name ↑	Phone Number	Email	Role	Actions								
Weston Cassidy		Weston.Cassady@fakedomain.com	Submitter									
4.	<p>To navigate to the next step, click “Next”.</p> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 4px;">Back</span> <span style="background-color: #0056b3; color: white; padding: 2px 10px; border-radius: 4px; font-weight: bold;">Next</span> <span style="border-bottom: 1px solid #ccc; padding: 2px 10px;">Save</span> </div>											

## 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.

**Well Selection & Disposition**

Please select an extension option below, and then indicate which well or wells you would like to include in the application. Click here to see the plugging estimate costs per district for the current fiscal year.

- G. The well identified is covered by an agreement of plugging report and the operator has paid the required filing fee and surcharge of \$200.00 under Rule 79 and Tex. Nat. Res. Code §81.070. (Please attach the agreement of plugging report).
- H. The well identified is part of a Commission - approved BDR Project.
- I. If the well identified is not otherwise required by Commission rule or order to conduct a fluid level or hydraulic pressure test of the well, and the operator has conducted a successful fluid level or hydraulic pressure test of the well and has paid the required filing fee and surcharge of \$200.00 under Rule 79 and Tex. Nat. Res. Code §81.070 (The test results must be filed with the Bureau of Geology or Permit File).
- J. The operator has filed additional financial security in the amount of the cost calculation for plugging the well identified.
- K. The operator has filed an advance fund deposit in an amount at least equal to 10% of the cost calculation for plugging the well identified above. (In the form of a certified cashier check or currency).

Select Wells Grid

API Number	District Number	Estimated Plugging Cost	W-3X Status	Oil Lessee ID Number	Required for Renewal?	
<input type="checkbox"/>	0120000	06	\$33,703.00	Approved	0-00-00100-10	Y
<input type="checkbox"/>	01102200	06	\$48,865.00	Approved	0-06-100004	Y
<input type="checkbox"/>	00001702	09		Approved	0-09-00219-1	
<input type="checkbox"/>	00001703	09		Approved	0-09-00219-2	
<input type="checkbox"/>	00001704	09		Approved	0-09-00219-4	
<input type="checkbox"/>	00001706	09		Approved	0-09-00219-5	
<input type="checkbox"/>	00001708	09	\$19,445.00	Approved	0-09-00219-6	Y
<input type="checkbox"/>	00001800	09	\$18,800.00	Approved	0-09-00219-9	Y
<input type="checkbox"/>	00001901	09		Approved	0-09-00219-10	Y
<input type="checkbox"/>	00001902	09		Approved	0-09-00219-12	
<input type="checkbox"/>	00001904	09		Approved	0-09-00219-13	

Associated Wells Grid

API Number	District Number	Estimated Plugging Cost	W-3X Status	Oil Lessee ID Number	Required for Renewal?	Actions
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### 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.	

Please select an extension option below, and then indicate which well or wells you would like to include in the application. Click [here](#) to see the plugging estimate costs per district for the current fiscal year. \* Indicates required field

- D. the well identified is covered by an abeyance of plugging report and the operator has paid the required filing fee and surcharge of \$250.00 under Rule 78 and Tex. Nat. Res. Code §81.070. (Please attach the abeyance of plugging report)
- E. The well identified is part of a Commission – approved EOR Project
- F. The well identified is not otherwise required by Commission rule or order to conduct a fluid level or hydraulic pressure test of the well, and the operator has conducted a successful fluid level or hydraulic pressure test of the well and has paid the required filing fee and surcharge of \$125.00 under Rule 78 and Tex. Nat. Res. Code §81.070 (The test results must be filed with the Railroad Commission on Form H-15)
- G. The operator has filed additional financial security in the amount of the cost calculation for plugging the well identified.
- H. The operator has filed an escrow fund deposit in an amount at least equal to 10% of the cost calculation for plugging the well identified above. (In the form of a certified cashier check or currency)

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.

Associated Financial Assurance

<input type="checkbox"/>	Financial A...	ID Number	Organization N...	Instrument Type	Instrument Value	Purpose	Status	Expiration Date
<input type="checkbox"/>	3194930	1210955	ENR OPERATING, LLC	Cash	\$1,355.00	W-3X Option H - Escrow Deposit	Approved	
<input type="checkbox"/>	3194931	1210955	ENR OPERATING, LLC	Cash	\$1,330.00	W-3X Option H - Escrow Deposit	Approved	
<input type="checkbox"/>	3194932	1210955	ENR OPERATING, LLC	Cash	\$973.40	W-3X Option H - Escrow Deposit	Approved	
<input type="checkbox"/>	3194933	1210955	ENR OPERATING, LLC	Cash	\$968.50	W-3X Option H - Escrow Deposit	Approved	
<input type="checkbox"/>	3194934	1210955	ENR OPERATING, LLC	Cash	\$968.50	W-3X Option H - Escrow Deposit	Approved	

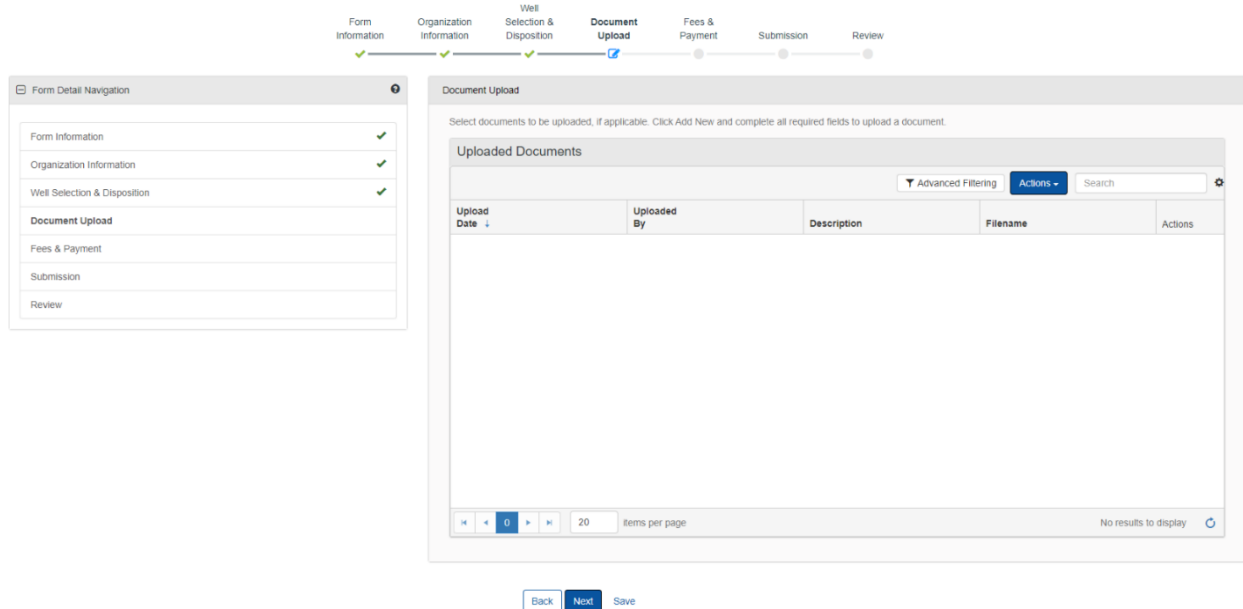
4. At least one Financial Assurance must be associated to the form submission. To do so, select the Chekbox to the left of the Financial Assurance(s) you would like to associate to this form submission.  
 Note: The Instrument Value of the selected Financial Assurance(s) must equal or exceed the sum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

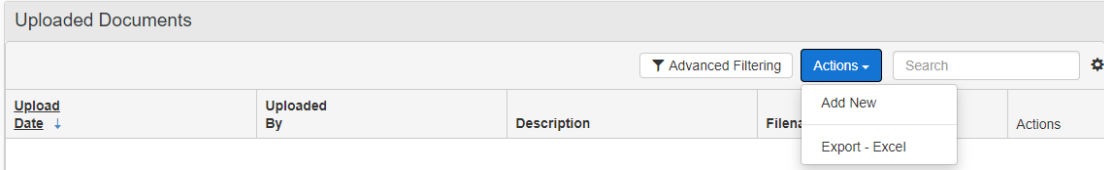
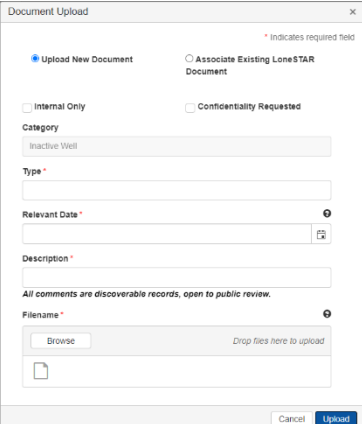
## 1.5 Document Upload Step

### 1.5.1 Key Points

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

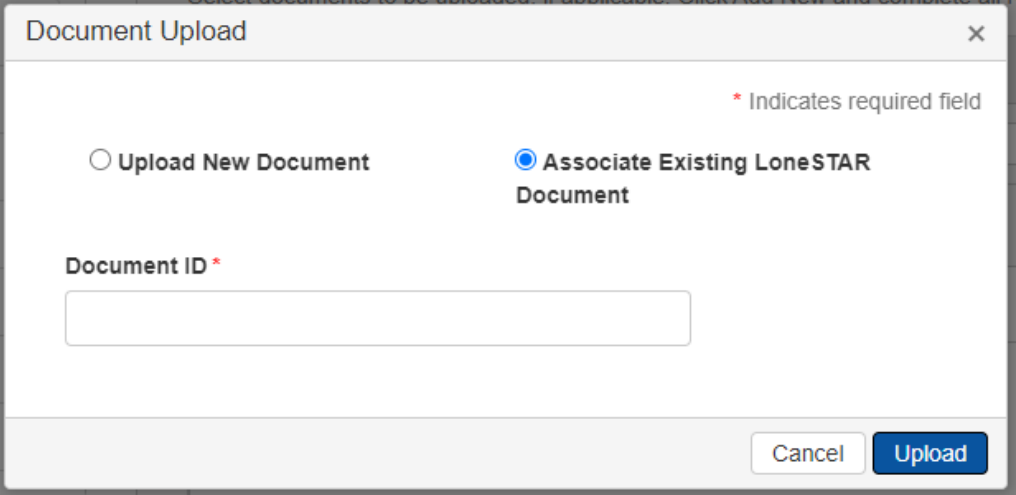

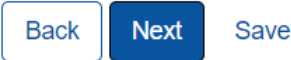


### 1.5.2 Steps to complete the Document Upload step

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.	



	<p> <input checked="" type="radio"/> Upload New Document         <span style="margin-left: 100px;"><input type="radio"/> Associate Existing LoneSTAR Document</span> </p> <p>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.</p>	
4.	<p>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.</p>	
5.	<p>To upload the document itself, select the Browse button. You will be presented with your file management window to select the document from.</p> <p><b>Filename *</b> <span style="float: right;">?</span></p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span style="border: 1px solid #ccc; padding: 2px 10px;">Browse</span> <span style="color: #666; font-style: italic;">Drop files here to upload</span> </div> <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px; display: flex; align-items: center; justify-content: center;"> </div> </div>	
6.	<p>Double click the document you would like to upload and the selected document will display in the Document Upload dialog.</p>	
7.	<p>LoneSTAR will display a message indicating the document was successfully uploaded.</p> <p><b>Filename *</b> <span style="float: right;">?</span></p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span style="border: 1px solid #ccc; padding: 2px 10px;">Browse</span> <span style="color: #666;">✓ Done</span> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p style="margin: 0;">Sample.Upload.xlsx</p> <p style="margin: 0; color: #4CAF50; font-size: small;">File(s) uploaded successfully.</p> </div> </div>	
8.	<p>Select Upload and the document will now display in the grid and will be associated to the form submission.</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span style="border: 1px solid #ccc; padding: 2px 10px;">Cancel</span> <span style="background-color: #0070C0; color: white; padding: 2px 10px; border-radius: 3px;">Upload</span> </div> </div>	
9.	<p>If instead of uploading a new document, an existing document can be associated.</p>	

	 <p>The dialog box is titled "Document Upload" and has a close button (X) in the top right corner. It contains two radio button options: "Upload New Document" (unselected) and "Associate Existing LoneSTAR Document" (selected). Below the options is a text input field labeled "Document ID *". At the bottom right, there are two buttons: "Cancel" and "Upload". A legend indicates that the asterisk (*) denotes a required field.</p>	
10.	<p>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.</p> 	
11.	<p>To navigate to the next step, click "Next".</p> 	

## 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.

Form Information   Organization Information   Well Selection & Disposition   Document Upload   **Fees & Payment**   Submission   Review

Form Detail Navigation

- Form Information ✓
- Organization Information ✓
- Well Selection & Disposition ✓
- Document Upload ✓
- Fees & Payment**
- Fees & Payments
- Submission
- Review

Fees & Payments



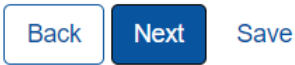
Displayed below are current fees and payments for this Organization. You are not required to pay all pending fees. Please note that a payment processing fee will be assessed for each separate electronic payment.

N	Type	Name	Status	Date Paid	Amount	RMS Register Num...	Actions
1	Fee	W-3X H-15 Filing Fee	Pending	N/A	\$1.00		Actions

Viewing 1 - 1 from 1 results

Back   Next   Save

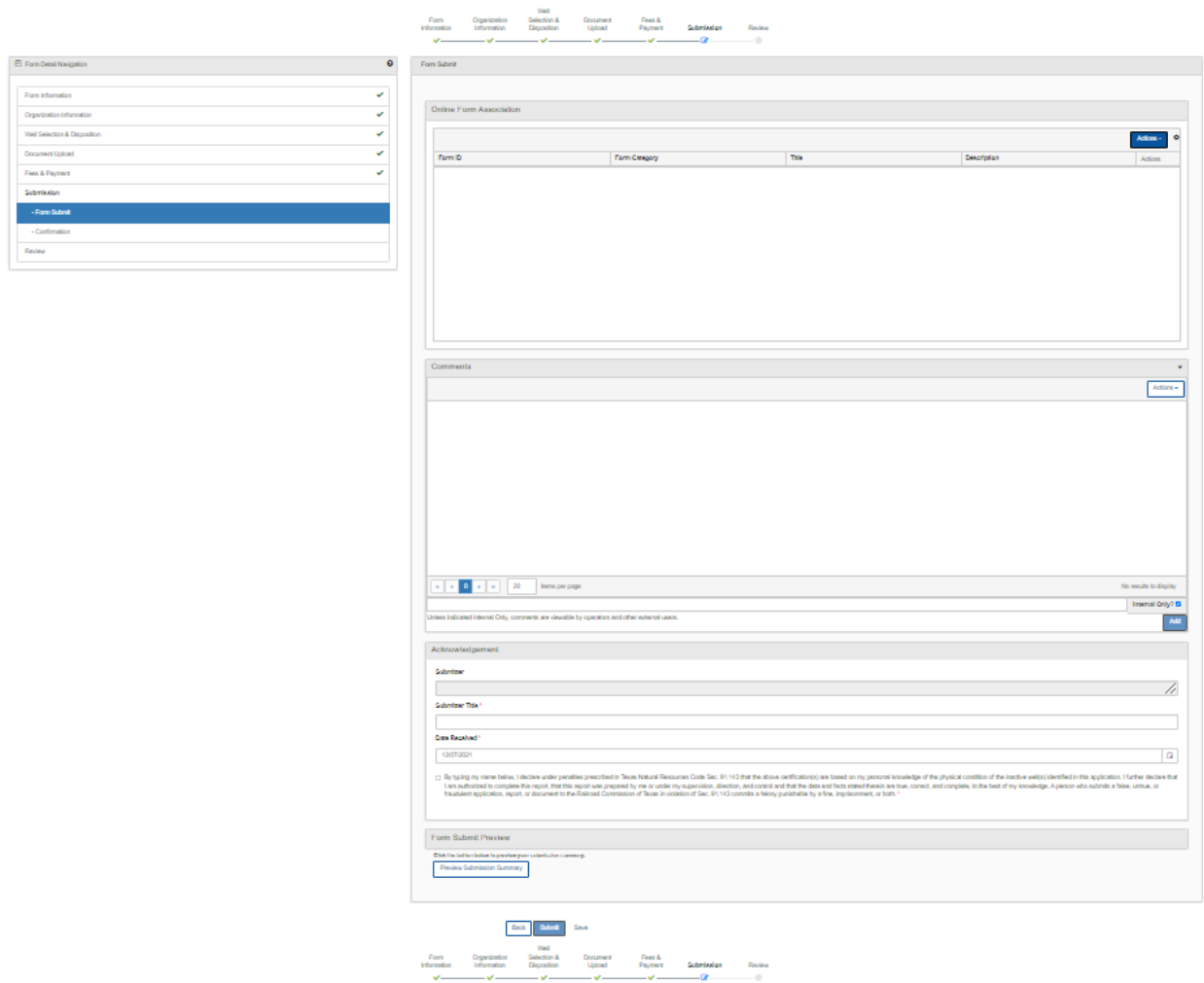
## 1.6.2 Steps to complete the Fees and Payment step

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.	<p>In order to make a payment for any required fees, select the row-level actions menu and select “Pay Fee Electronically”.</p>  <p>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.</p>	
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.	<p>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.</p> 	
6.	The above steps are replicable for all fees in the grid.	
7.	<p>To navigate to the next step, click “Next”.</p> 	


## 1.7 Form Submit and Confirmation Steps

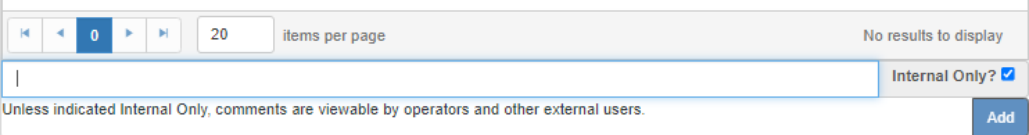
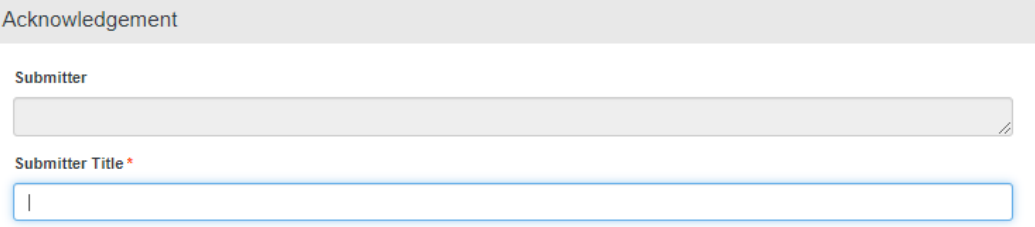

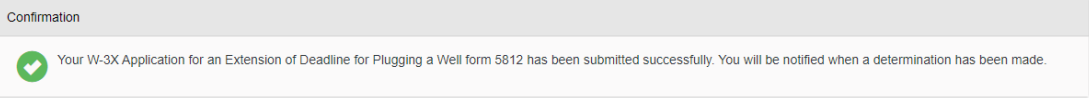
### 1.7.1 Key Points

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



### 1.7.2 Steps to complete the Form Submit step

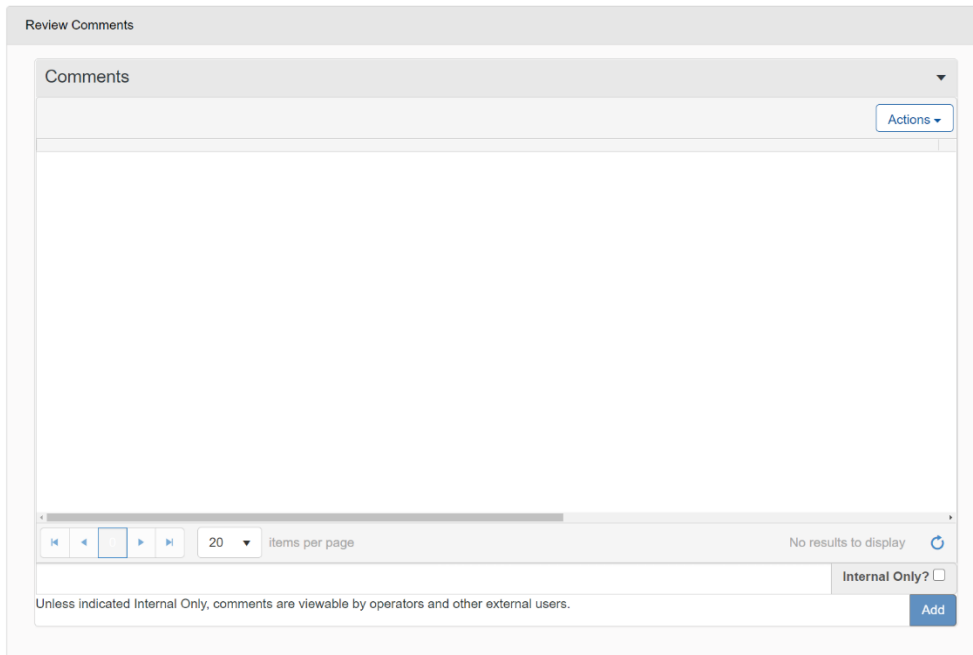
Step	Action	Required Fields
1.	To associate an existing online form to be part of this form submission, you can select the Add Form action and select the form from the subsequent dialog. 	
2.	To add a comment, enter the text of the comment in the comment textbox and press the Add button.	

		
3.	<p>In the Acknowledgement section, the user must enter their submitter title and indicate the date this form was received.</p> 	Submitter Title, Date Received
4.	<p>Select the certification checkbox.</p> <p><input checked="" type="checkbox"/> By typing my name below, I declare under penalties prescribed in Texas Natural Resources Code Sec. 91.143 that the above certification(s) are based on my personal knowledge of the physical condition of the inactive well(s) identified in this application. I further declare that I am authorized to complete this report, that this report was prepared by me or under my supervision, direction, and control and that the data and facts stated therein are true, correct, and complete, to the best of my knowledge. A person who submits a false, untrue, or fraudulent application, report, or document to the Railroad Commission of Texas in violation of Sec. 91.143 commits a felony punishable by a fine, imprisonment, or both. *</p>	Certification Checkbox
5.	<p>Select the Submit button to submit the form.</p>  <p>Note: The Submit button is deactivated until all required fields are completed on this step.</p>	
6.	<p>When the form is submitted, the Confirmation message will be displayed to indicate the form has been submitted and the workflow processing has begun.</p>  <p>Note:</p> <ul style="list-style-type: none"> <li>• Refreshing the page will display if the workflow processing has been completed.</li> <li>• Once the form has been submitted, External Users can no longer edit the form.</li> </ul>	

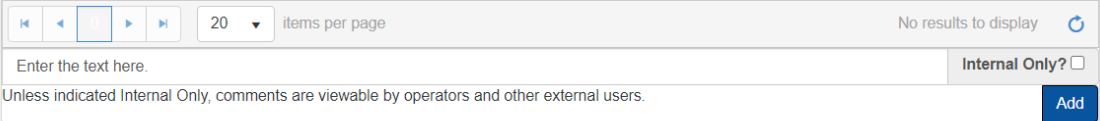

## 1.8 Review Comments Step

### 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.	<p>To add a comment, enter the text of the comment in the comment textbox, select Internal Only? checkbox, and press the Add button.</p> <p>Note:</p> <ul style="list-style-type: none"> <li>• Internal Only comments will only be viewable by Internal Users.</li> <li>• The Internal Only? checkbox selection persists between entering comments.</li> </ul> 	
2.	<p>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.</p>	
3.	<p>Select the Next button to proceed to the next step.</p> 	

## 1.9 Review Step

### 1.9.1 Key Points

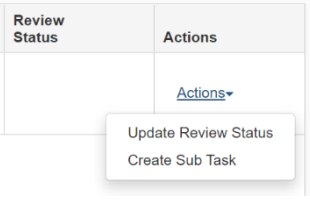
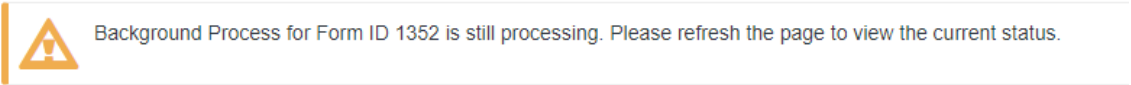
- Learn how to complete the Review Step.

Review						
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
<a href="#">Review Financial Assurance Information</a>	P-5 Workgroup		03/09/2021 09:17 AM	03/09/2021 09:17 AM		<a href="#">Actions</a> ▼

10 items per page
 Viewing 1 - 1 from 1 results

**1.9.2 Steps to complete the Review step**

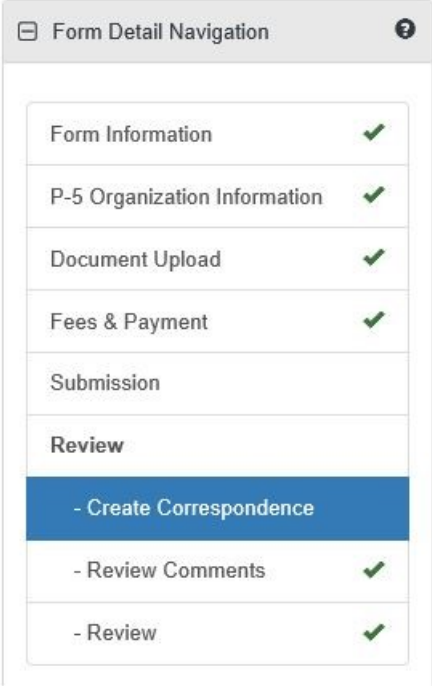
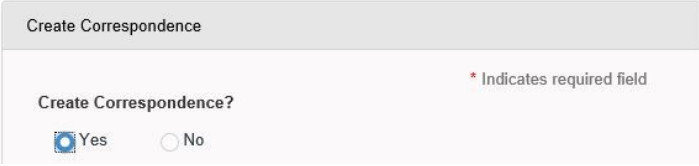
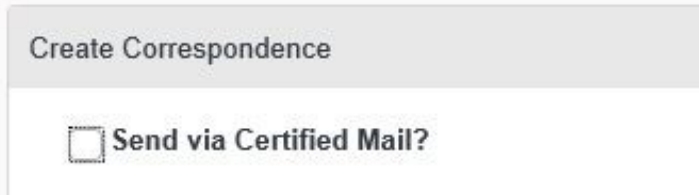
1.	The step is pre-populated with a review task to be completed.	
2.	Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.	


3.	<p>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.</p> <p><b>Assigned To</b></p> <p>Nicholas Bennett</p> <p><b>Due Date *</b></p> <p>02/10/2021</p> <p><b>Created Date</b></p> <p>02/09/2021</p> <p><b>Created By</b></p> <p>System</p> <p>Cancel Save</p>	Assigned To, Due Date
4.	<p>Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.</p>	
5.	<p>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.</p>	
6.	<p>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.</p>	Review Status
7.	<p>Workflow processing will begin and you will be notified that you can refresh the page to view the updated status.</p> 	
8.	<p>When workflow processing is complete, repeat the previous steps for any subsequent review tasks, approving each one.</p>	
9.	<p>When the final review task has been approved and workflow processing is complete, the form can be closed.</p>	





## 1.10 Review Step

### 1.10.1 Create Correspondence Step

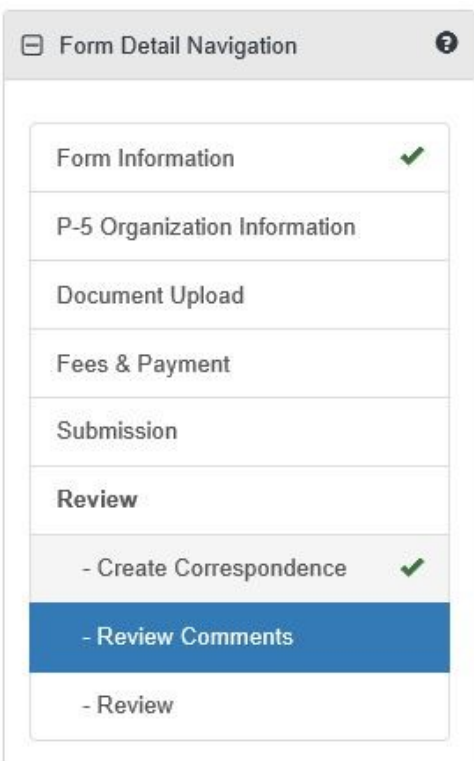
Step	Action	Required Fields
1.	<p>Select the “Review” tab under Form Detail Navigation, and then select “Create Correspondence.”</p>  <p>The screenshot shows a 'Form Detail Navigation' menu with several options. The 'Review' section is expanded, and '- Create Correspondence' is highlighted in blue. Other options include 'Form Information', 'P-5 Organization Information', 'Document Upload', 'Fees &amp; Payment', 'Submission', '- Review Comments', and '- Review', all of which have green checkmarks next to them.</p>	Create Correspondence
2.	<p>For the purpose of this guide, choose “Yes” to Create Correspondence.</p>  <p>The screenshot shows a 'Create Correspondence' dialog box. It contains the question 'Create Correspondence?' with two radio buttons: 'Yes' (which is selected) and 'No'. A red asterisk and the text '* Indicates required field' are visible to the right of the question.</p>	Yes
3.	<p>Choose not to Send via Certified Mail.</p>  <p>The screenshot shows a 'Create Correspondence' dialog box with a checkbox labeled 'Send via Certified Mail?' which is currently unchecked.</p>	<p>Do not check “Send via Certified Mail?”</p> <p>“Ready to Send” should be left alone until Step 12.</p>


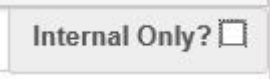

4.	<p>Select the Correspondence Type dropdown to be General.</p> <p><b>Correspondence Type</b></p> 	
5.	<p>Complete the Subject line to be “Financial Assurance Correspondence.”</p> <p><b>Subject *</b></p> <input data-bbox="266 716 1045 774" type="text" value="Financial Assurance Correspondence"/>	Subject
6.	<p>Complete the Signatory Name field as your preferred name.</p> <p><b>Signatory Name *</b></p> <input data-bbox="266 936 639 995" type="text" value="Your Name Here"/>	Signatory Name
7.	<p>For the purpose of this example, do not select to CC any additional organizations. (Leave box blank)</p> <p><b>CC Organizations</b></p> <input data-bbox="266 1199 662 1266" type="text"/>	
8.	<p>From the Signatory Department dropdown, select “P-5 Financial Assurance Unit.”</p> <p><b>Signatory Department *</b></p> <input data-bbox="266 1472 662 1539" type="text" value="P-5 Financial Assuranc..."/>	Signatory Department
9.	<p>For the purpose of this example, do not select to CC any additional people. (Leave box blank)</p> <p><b>CC People</b></p> <input data-bbox="266 1745 662 1812" type="text"/>	

<p>10.</p>	<p>Enter description to be able to identify this document at a later time.</p> <p><b>Description * </b></p> <div data-bbox="266 317 654 384" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Example Correspondence</p> </div> <p>Note:</p> <p>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.</p>	<p>Description</p>
<p>11.</p>	<p>Complete the Correspondence Text field with the desired text to be sent to the Organization as the body of the text.</p> <p><b>Correspondence Text *</b></p> <div data-bbox="266 764 1057 993" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>This is where you will enter the information that needs to be sent back to the filer.</p> </div>	<p>Correspondence Text</p>
<p>12.</p>	<p>Navigate back to the top of the step, click the “Ready to Send?” Checkbox.</p> <div data-bbox="266 1157 513 1203" style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Ready to Send?         </div> <p>Note:</p> <p>If this is not selected, the correspondence will not be sent.</p>	
<p>13.</p>	<p>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.</p> <div data-bbox="266 1499 423 1591" style="margin-bottom: 10px;"> <p><a href="#">Preview</a></p> </div> <p>Note:</p> <p>A .pdf will be created, and you will be prompted for the download.</p>	

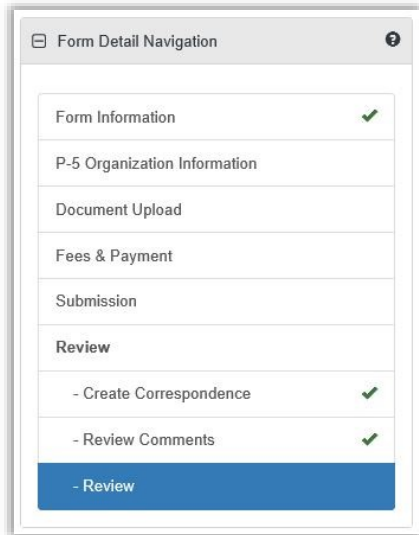
14.	<p>To navigate to the next step, click “Next.”</p>  <p>Note:</p> <p>Once the form is saved, no edits can be made on the page. If corrections are needed, the form will need to be withdrawn and the user will need to start over. It is important to review all work before saving.</p>	
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### 1.10.2 Review Comments Step

Step	Action	Required Fields
1.	<p>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.</p> 	

<p>2.</p>	<p>To add a comment, enter the text of the comment in the comment textbox, select Internal Only? Checkbox if needed.</p> <p>Select the Add button to add the comment.</p>  <p>Note:</p> <ul style="list-style-type: none"> <li>• Internal Only comments will only be viewable by Internal Users.</li> <li>• The Internal Only? checkbox selection persists between entering comments.</li> </ul>	
<p>3.</p>	<p>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.</p> 	
<p>4.</p>	<p>Select the Next button to proceed to the next step.</p> 	

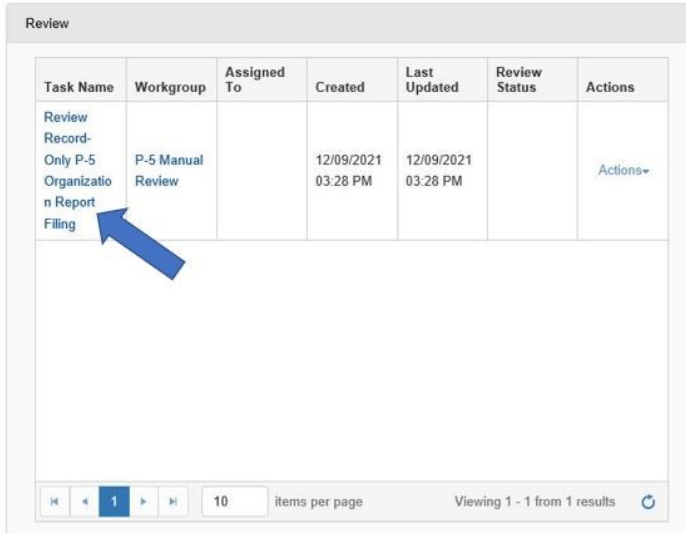
### 1.10.3 Review Step



- 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.

Step	Action	Required Fields														
1.	<p>The step is pre-populated with a review task to be completed.</p> <div data-bbox="256 1163 1143 1843" style="border: 1px solid #ccc; padding: 10px;"> <p>Review</p> <table border="1"> <thead> <tr> <th>Task Name</th> <th>Workgroup</th> <th>Assigned To</th> <th>Created</th> <th>Last Updated</th> <th>Review Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Review Record-Only P-5 Organization Report Filing</td> <td>P-5 Manual Review</td> <td></td> <td>12/09/2021 03:28 PM</td> <td>12/09/2021 03:28 PM</td> <td></td> <td>Actions→</td> </tr> </tbody> </table> <p>10 items per page      Viewing 1 - 1 from 1 results</p> </div>	Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions	Review Record-Only P-5 Organization Report Filing	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		Actions→	
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions										
Review Record-Only P-5 Organization Report Filing	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		Actions→										

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.



Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
<a href="#">Review Record-Only P-5 Organization Report Filing</a>	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		<a href="#">Actions</a> ▼

Navigation: 10 items per page, Viewing 1 - 1 from 1 results

A separate browser tab will open, showing the Task Detail Page.

3. 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

Assigned To

David King

Adam Bowerman  
David King  
Emily Gilstrap  
Erin Ake  
Jacquelyn Teseny

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

Due Date \*

12/15/2021 

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



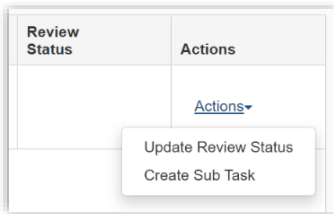
Assigned To, Due Date

4. Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.

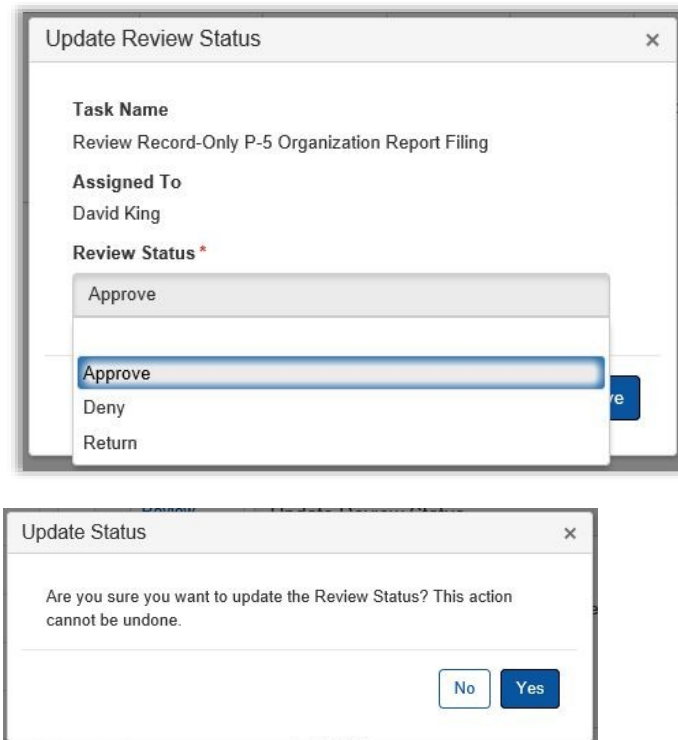


Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
Review Record-Only P-5 Organization Report Filing	P-5 Manual Review	David King	12/09/2021 03:28 PM	12/10/2021 10:33 AM		Actions▼

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 “Approve” from the Review Status dropdown and select Save to disposition the task. When asked to confirm, select “Yes” to continue.



**Update Review Status**

Task Name  
Review Record-Only P-5 Organization Report Filing

Assigned To  
David King

Review Status \*  
Approve

Approve  
Deny  
Return

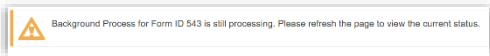
**Update Status**

Are you sure you want to update the Review Status? This action cannot be undone.

No Yes

Review Status



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.	