



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

Release 1 Software Design

User Guide

W-3C Certification of Surface Equipment Removal for an Inactive Well - Option D

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COURSE OVERVIEW

Course Description

This guide can be used to certify the removal of surface equipment for inactive wells in order to be compliant with Statewide Rule 15.

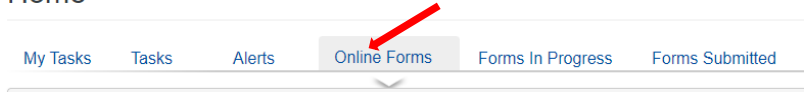
1.1 Launching the Form

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. Home 	
3.	OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well	

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.

Online Forms : OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well Hello Adam Bouwman, Railroad Commission of Texas

OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well Help

Form Detail Navigation

Form Information

Form Name
W-3C Certification of Surface Equipment Removal for an Inactive Well

Organization*

Certification Option*

- A. Electric service to the production sites for the well(s) identified has been physically terminated, or the sites do not have electrical service.
- B1. All piping, tanks, vessels, and equipment associated with and exclusive to the well(s) identified have been emptied or purged of production fluids, OR
- B2. The Operator owns the surface of the land where the well(s) is located.
- C1. All surface equipment and related piping, tanks, tank batteries, pump jacks, headers, fences, and firewalls associated with and exclusive to the well(s) identified have been removed, all open pits associated with and exclusive to the well(s) identified in this form have been closed and all junk and trash, as defined by Commission rule have been removed, OR
- C2. The Operator owns the surface of the land where the well is located, OR
- C3. The well is part of a Commission recognized EOR and the equipment remaining on the lease is solely associated with current and future operations of the project.
- D. I am unable to comply with the surface equipment cleanup/removal requirements due to safety concerns or required maintenance of the well site. I have attached a written affirmation of the facts regarding the safety concerns or maintenance and request a temporary exception. (Fee set under Rule 78, Tex. Nat. Res. Code 81.0521 & Tex. Nat. Res. Code 81.070) (\$375.00 fee per well)
- This well is not subject to 14(b)(2).
- One or more wells require a removal of certification.

Hard Copy Submission? Date Received*
MM/DD/YYYY

Description*

Cancel Save & Continue

1.2.2 Steps to complete the Form Information step

Step	Action	Required Fields
1.	<p>Select the Organization you are submitting the W-3C on behalf of.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>Form Information</p> <p style="text-align: right;">* Indicates required field</p> <p>Form Name W-3C Certification of Surface Equipment Removal for an Inactive Well</p> <p>Organization*</p> </div>	
2.	<p>Select the purpose of the W-3C being submitted. For this example, select Option D.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>Certification Option*</p> <ul style="list-style-type: none"> <input type="checkbox"/> A. Electric service to the production sites for the well(s) identified has been physically terminated, or the sites do not have electrical service. <input type="checkbox"/> B1. All piping, tanks, vessels, and equipment associated with and exclusive to the well(s) identified have been emptied or purged of production fluids; OR <input type="checkbox"/> B2. The Operator owns the surface of the land where the well(s) is located. <input type="checkbox"/> C1. All surface equipment and related piping, tanks, tank batteries, pump jacks, headers, fences, and firewalls associated with and exclusive to the well(s) identified have been removed, all open pits associated with and exclusive to the well(s) identified in this form have been closed and all junk and trash, as defined by Commission rule have been removed; OR <input type="checkbox"/> C2. The Operator owns the surface of the land where the well is located; OR <input type="checkbox"/> C3. The well is part of a Commission recognized EOR and the equipment remaining on the lease is solely associated with current and future operations of the project. <input checked="" type="checkbox"/> D. I am unable to comply with the surface equipment cleanup/removal requirements due to safety concerns or required maintenance of the well site. I have attached a written affirmation of the facts regarding the safety concerns or maintenance and request a temporary exception. (Fee set under Rule 78, Tex. Nat. Res. Code 81.0521 & Tex. Nat. Res. Code 81.070) (\$375.00 fee per well). <input type="checkbox"/> This well is not subject to 14(b)(2). <input type="checkbox"/> One or more wells require a removal of certification. </div> <p>Note: Only one selection may be made for each letter grouping (e.g. Box C1 OR Box C2 OR Box C3).</p>	
3.	Keep the Hard Copy Submission? Checkbox selected.	

	<p>Hard Copy Submission? <input checked="" type="checkbox"/></p> <p>Date Received * <input type="text" value="MM/DD/YYYY"/></p> <p>Note: The purpose of this is to indicate an Operator sent a W-3C 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>Description * <input type="text"/></p>	
5.	<p>Click Save & Continue</p> <p>Note: At this point, this is now considered a form instance in LoneSTAR</p> <p><input type="button" value="Cancel"/> <input type="button" value="Save & Continue"/></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.	<p>The first information presented includes the information for the organization itself as entered on the P-5 Organization Report.</p> <div data-bbox="245 275 1292 520"> <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> <table border="0"> <tr> <td>Organization Long Name ENR OPERATING, LLC</td> <td>Type of Organization Limited Liability Company (LLC or LC)</td> </tr> <tr> <td>Organization Short Name ENR OPERATING, LLC</td> <td>RRC Operator Number 253075</td> </tr> <tr> <td>Organization Primary Address 5445 LEGACY DR STE 440 PLANO, Texas 75024</td> <td></td> </tr> <tr> <td>Organization Primary Phone Number (214) 526-8600</td> <td>Ext</td> </tr> </table> </div>	Organization Long Name ENR OPERATING, LLC	Type of Organization Limited Liability Company (LLC or LC)	Organization Short Name ENR OPERATING, LLC	RRC Operator Number 253075	Organization Primary Address 5445 LEGACY DR STE 440 PLANO, Texas 75024		Organization Primary Phone Number (214) 526-8600	Ext			
Organization Long Name ENR OPERATING, LLC	Type of Organization Limited Liability Company (LLC or LC)											
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Organization Primary Address 5445 LEGACY DR STE 440 PLANO, Texas 75024												
Organization Primary Phone Number (214) 526-8600	Ext											
3.	<p>Below, the grid displays users who are associated to the form submission.</p> <div data-bbox="245 569 1292 705"> <p>Contacts</p> <table border="1"> <thead> <tr> <th>Name ↑</th> <th>Phone Number</th> <th>Email</th> <th>Role</th> <th>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> </div> <p>Note: A user with a Role of Submitter is automatically added as the user who is currently in context of the online form.</p>	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 data-bbox="261 856 553 919"> <p>Back Next Save</p> </div>											

1.4 Well Selection & Disposition

1.4.1 Key Points

- Learn how to associate a well, or list of wells to certify that all wells have been placed in compliance with Statewide Rule 15.

The screenshot shows the 'Well Selection & Disposition' interface. On the left is a 'Panel Detail Navigation' menu with options: Point Information, Organization Information, Well Selection & Disposition (selected), Document Upload, Fees & Payment, Submission, and Review. The main content area is titled '0 Certification' and contains a table with the following columns: Organization Name, API Number, Wellin Date, WJCC Status, Oil Lease/Dec ID Number, Year 1 Certification Date, Year 2 Certification Date, Year 3 Certification Date, Year 4 Certification Date, Year 5 Certification Date, Year 6 Certification Date, Year 7 Certification Date, Year 8 Certification Date, Year 9 Certification Date, and Year 10 Certification Date. The table lists several entries for 'ENR OPERATING, LLC' with various API numbers and dates, all showing 'Not Filed' for WJCC Status and 'N/A' for certification dates.

1.4.2 Steps to complete the Wells step

Step	Action	Required Fields
------	--------	-----------------

1. This step will display differently based on the information selected on the Form Information step.

D Certification

Select Well(s)

<input type="checkbox"/>	Organization Name	API Number ↑	Shut-In Date	W-3C Status	Oil Lease/Gas ID Number	Year 1 Certification Date	Year 5 Certification Date	Year 10 Certification Date
<input type="checkbox"/>	ENR OPERATING, LLC	00132265	03/01/2019	Not Filed	G 06 169994	N/A	N/A	N/A
<input type="checkbox"/>	ENR OPERATING, LLC	00903811	09/01/2015	Not Filed	O 09 00219 28	06/07/2018	N/A	N/A
<input type="checkbox"/>	ENR OPERATING, LLC	00940367	03/01/2014	Not Filed	O 09 00219 74 S	02/11/2016	N/A	02/11/2016
<input type="checkbox"/>	ENR OPERATING, LLC	36336020	06/01/2011	Not Filed	G 7B 260862	04/29/2013	11/28/2016	N/A
<input type="checkbox"/>	ENR OPERATING, LLC	48702347	03/01/2019	Not Filed	O 09 16743 3 L	N/A	N/A	N/A
<input type="checkbox"/>	ENR OPERATING, LLC	50334157	10/01/2019	Not Filed	O 09 20373 3	N/A	N/A	N/A

20 items per page Viewing 1 - 6 from 6 results

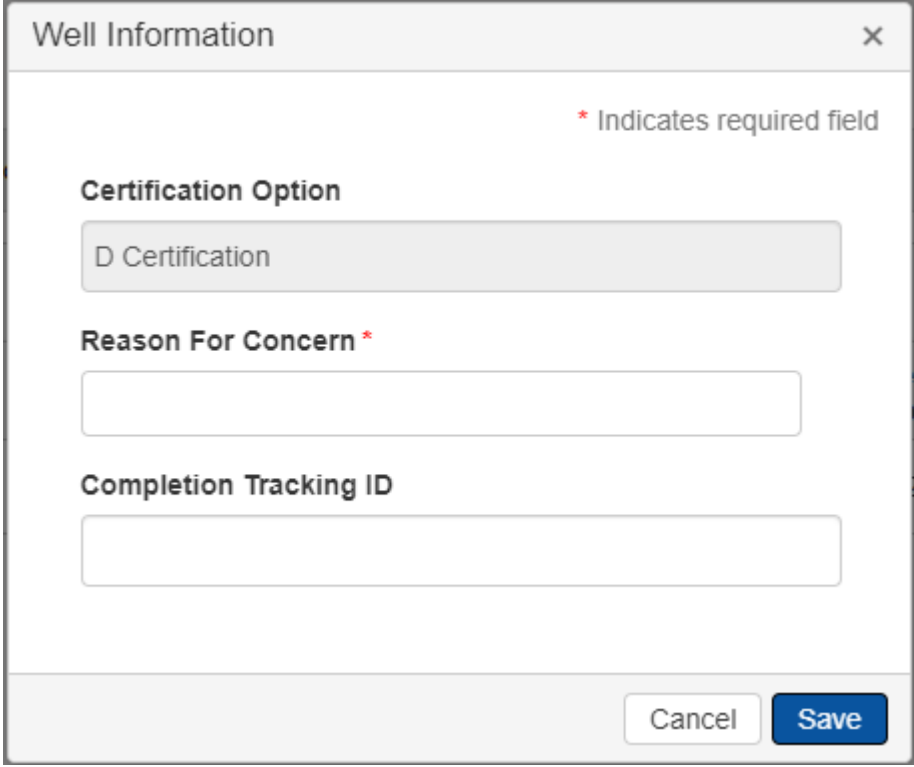

3. Use the selection boxes in the Well Selection grid to choose all wells that are associated with this W-3C submission. The Well Selection grid fields may be filtered to assist in well selection.

4. After all wells have been selected from the Well Selection grid, use the (down) selection arrow to populate the Associated Wells grid. The (up) selection arrow may be used to remove wells from the Associated Wells grid.

20 items per page Viewing 1 - 2 from 2 results

5. After the Associated Wells grid has been populated with all desired wells, select the row-level actions for the selected well(s) to display the Well Information modal.

6. Within the modal, select a Reason For Concern from the dropdown for why this well should be part of D Certification. Select Save to close the modal.

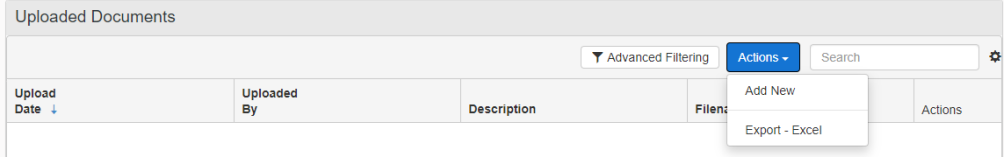
		
7.	<p>To navigate to the next step, click “Next”.</p> 	

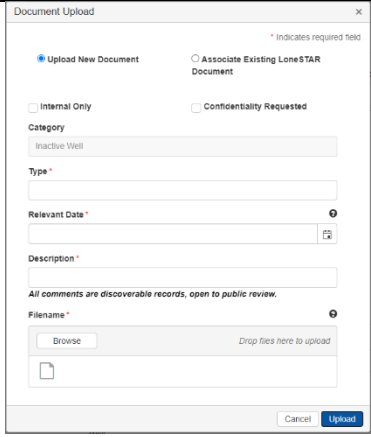

1.5 Document Upload

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

	Action	Required Fields
	<p>To upload a new document, click the grid-level actions menu and select to Add New.</p> 	
	<p>You will be presented with the Document Upload dialog.</p>	

		
	<p>The user can choose to upload a new document or associate an existing document.</p> <p style="text-align: center;"> <input checked="" type="radio"/> Upload New Document <input type="radio"/> Associate Existing LoneSTAR Document </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>	
	<p>If you choose to upload a new document, you must select the type of document to be associated to the document. Select a type, set the relevant date to today, and enter a description which can be easily identified later.</p>	
	<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>Double click the document you would like to upload and the selected document will display in the Document Upload dialog.</p>	
	<p>LoneSTAR will display a message indicating the document was successfully uploaded.</p>	

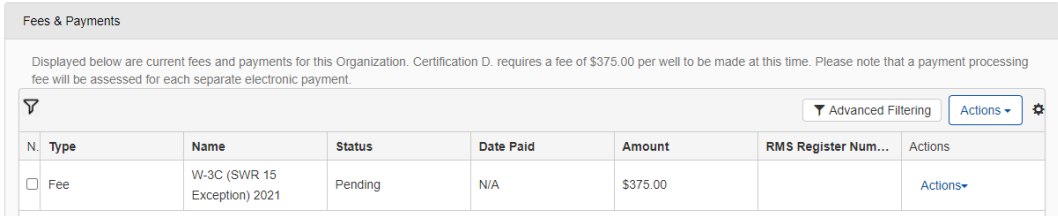

	<p>Filename * ?</p> <div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Browse ✓ Done </div> <div style="margin-top: 5px;"> <p>Sample.Upload.xlsx</p> <p style="color: green; font-size: small;">File(s) uploaded successfully.</p> </div> </div>	
	<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; display: flex; justify-content: flex-end; gap: 10px;"> Cancel Upload </div>	
	<p>If instead of uploading a new document, an existing document can be associated.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Document Upload × </div> <div style="text-align: right; font-size: small; color: red; margin-top: 5px;">* Indicates required field</div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <input type="radio"/> Upload New Document <input checked="" type="radio"/> Associate Existing LoneSTAR Document </div> <div style="margin-top: 10px;"> <p>Document ID *</p> <input style="width: 100%;" type="text"/> </div> <div style="display: flex; justify-content: flex-end; align-items: center; margin-top: 10px;"> Cancel Upload </div> </div>	
	<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> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: flex-end; gap: 10px;"> Cancel Upload </div>	
	<p>Select Next to save the uploaded documents and proceed to the next step. Select Save to save the uploaded documents without proceeding to the next step. Selecting Back will return the user to the Well Selection & Disposition page.</p> <div style="display: flex; justify-content: flex-start; align-items: center; gap: 10px; margin-top: 10px;"> Back Next Save </div>	

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 Fee 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 “Add Transaction” and add the applicable transaction to cover the cost of the fee. 	
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”.	

Back

Next

Save

1.7 Submission

1.7.1 Key Points

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

Form Detail Navigation

- Form Information ✓
- Organization Information ✓
- Well Selection & Disposition ✓
- Document Upload ✓
- Fees & Payment ✓
- Submission
- Form Submit
- Confirmation
- Review

Form Submit

Online Form Association

Form ID	Form Category	Title	Description	Actions
No results to display				

Comments

Unless indicated Internal Only, comments are viewable by operators and other external users.

Internal Only Add

20 items per page

Acknowledgment

Submitter: _____

Submitter Title: _____

Date Received: _____

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 tractive 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.

Form Submit Preview

Click the button below to generate your collection summary.

Preview Submission Summary

Back

Submit

Save

Form Information ✓

Organization Information ✓

Well Selection & Disposition ✓

Document Upload ✓

Fees & Payment ✓

Submission

Review

Form Information ✓

Organization Information ✓

Well Selection & Disposition ✓


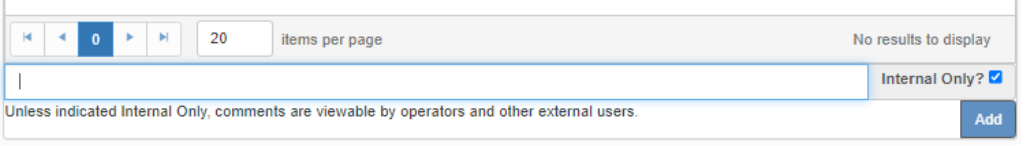
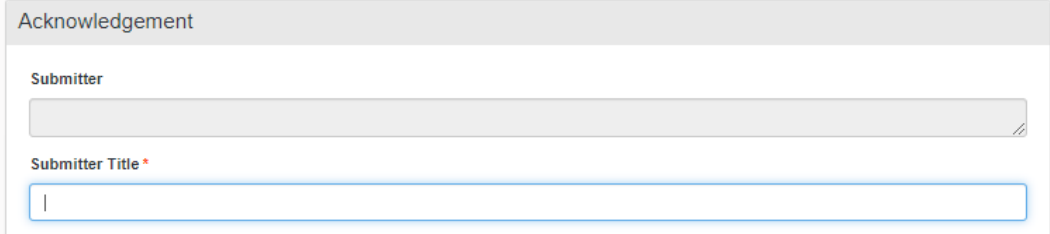
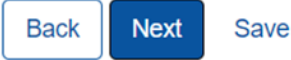

Document Upload ✓

Fees & Payment ✓

Submission

Review

1.7.2 Steps to complete the Form Submit step

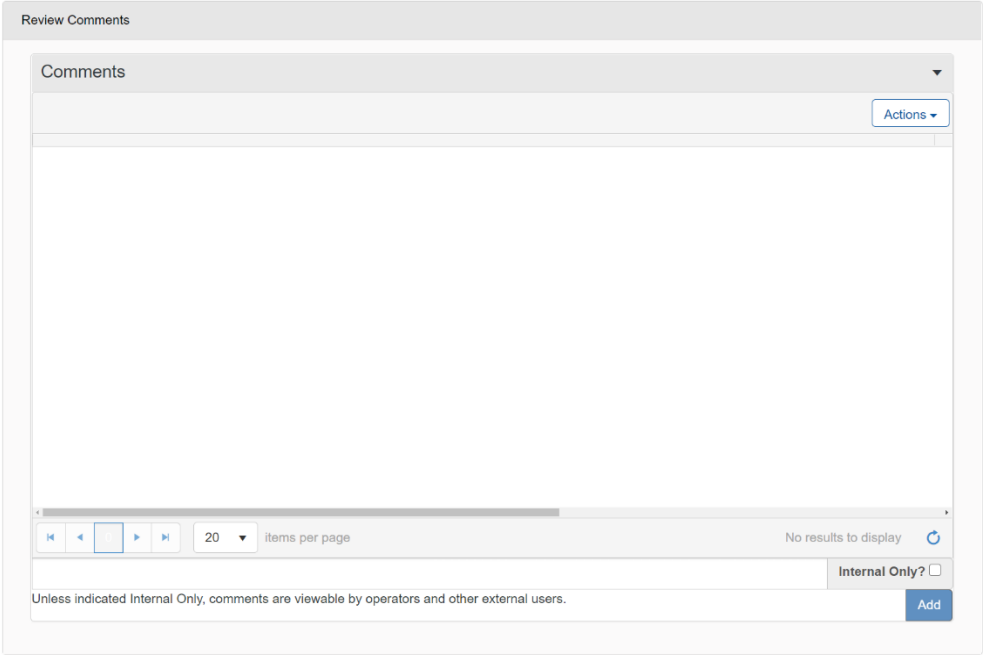
	Action	Required Fields
	<p>To associate an existing online form to be part of this form submission, you can select the Add Form action and select the form from the subsequent dialog.</p> 	
	<p>To add a comment, enter the text of the comment in the comment textbox and press the Add button.</p> 	
	<p>In the Acknowledgement section, the user must enter their submitter title.</p> 	Submitter Title
	<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
	<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>	
	 <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. Note: Refreshing the page will display if the workflow processing has been completed.</p>	

	Once the form has been submitted, External Users can no longer edit the form.	
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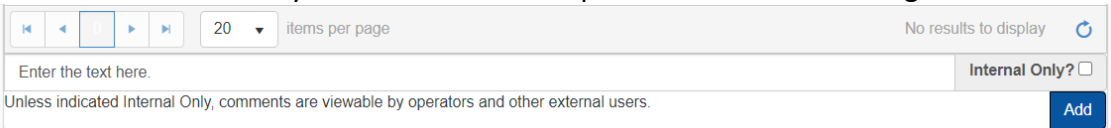
1.8 Review Comments Step

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"> • 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

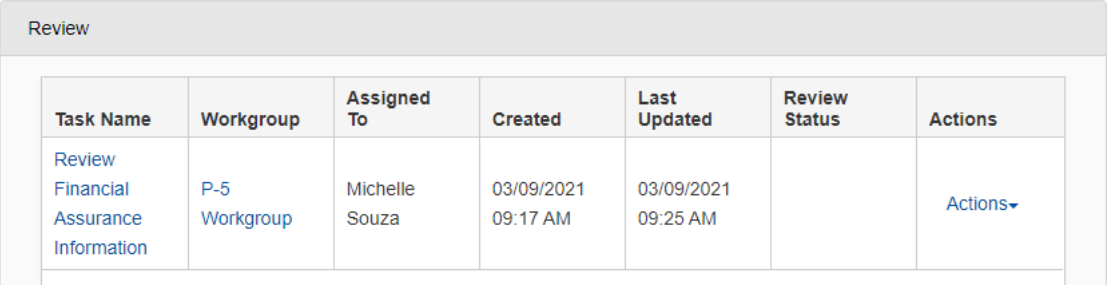
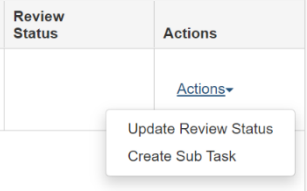
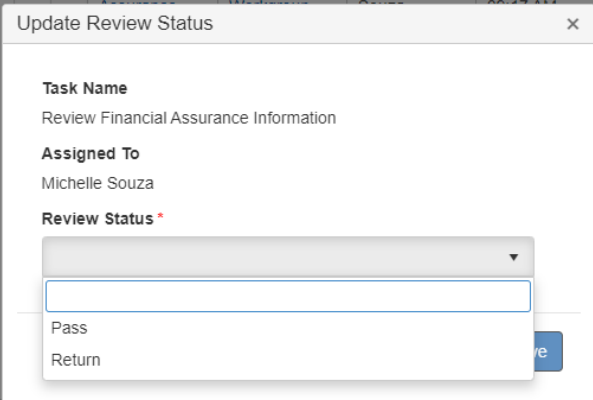
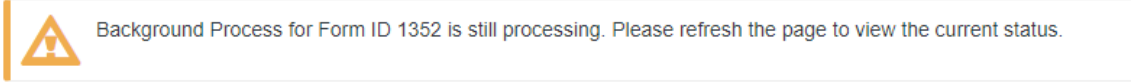
1.9.1 Key Points

- Learn how to complete the Review Step.

Task Name	Form Description	Subject ID	Organization	Workgroup	Assigned To	Due Date ↑	Actions
Review W-3C Task Determination	Description.	A. Electric service to the production sites for the well(s) identified has been physically terminated or the sites do not have electrical service.	TALOS GULF COAST ONSHORE LLC	W-3C Review		05/04/2021	Actions

1.9.2 Steps to complete the Review step

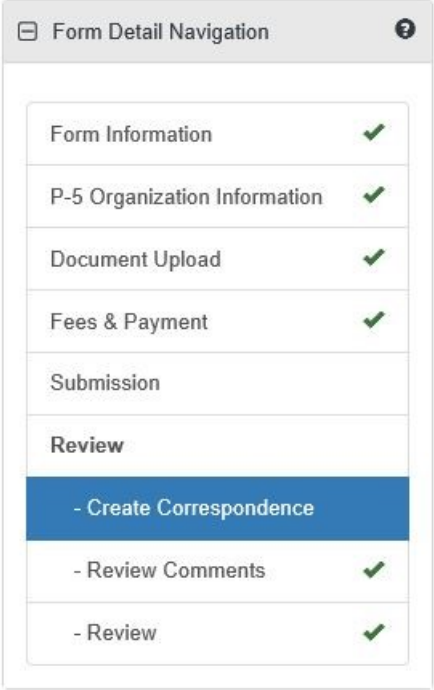

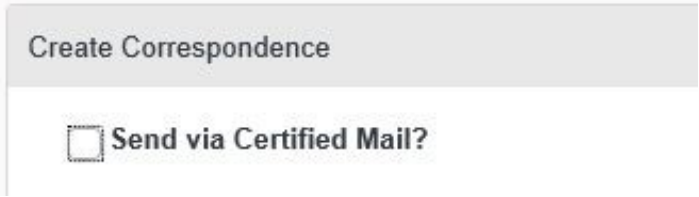
1.	The step is pre-populated with a review task to be completed.	
2.	Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.	
3.	<p>To assign the task to yourself, select the Edit button and in the Assigned To dropdown, select your name from the list, set a Due Date, and select Save.</p> <p>Assigned To</p> <p>Nicholas Bennett</p> <p>Due Date *</p> <p>02/10/2021</p> <p>Created Date</p> <p>02/09/2021</p> <p>Created By</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 Approve 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, the form can be closed.</p>		

1.10 Review Step


1.10.1 Create Correspondence Step

Step	Action	Required Fields
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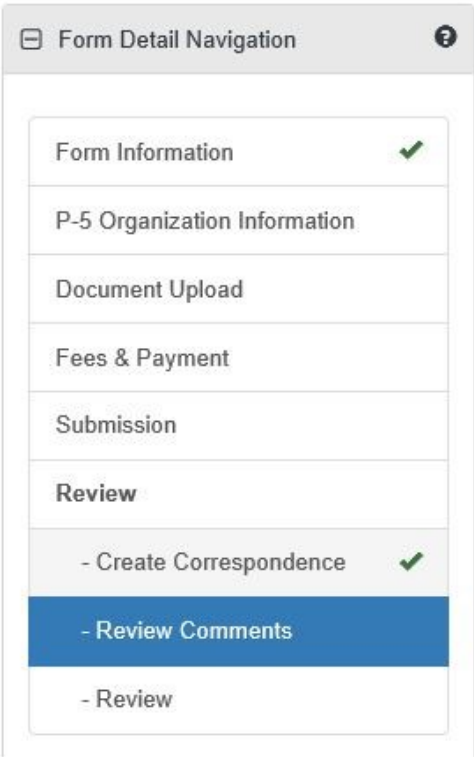
<p>1.</p>	<p>Select the “Review” tab under Form Detail Navigation, and then select “Create Correspondence.”</p>  <p>The screenshot shows a 'Form Detail Navigation' sidebar with a list of items: Form Information (checked), P-5 Organization Information (checked), Document Upload (checked), Fees & Payment (checked), Submission, Review (selected), - Create Correspondence (highlighted in blue), - Review Comments (checked), and - Review (checked). A small 'c' is located at the bottom left of the screenshot.</p>	<p>Create Correspondence</p>
<p>2.</p>	<p>For the purpose of this guide, choose “Yes” to Create Correspondence.</p>  <p>The screenshot shows a 'Create Correspondence' dialog box with the question 'Create Correspondence?' and two radio buttons: 'Yes' (selected) and 'No'. A red asterisk and the text '* Indicates required field' are visible to the right of the question.</p>	<p>Yes</p>
<p>3.</p>	<p>Choose not to Send via Certified Mail.</p>  <p>The screenshot shows a 'Create Correspondence' dialog box with an unchecked checkbox labeled 'Send via Certified Mail?'.</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>Correspondence Type</p> 	
5.	<p>Complete the Subject line to be “Financial Assurance Correspondence.”</p> <p>Subject *</p> <input data-bbox="354 716 1133 772" type="text" value="Financial Assurance Correspondence"/>	Subject
6.	<p>Complete the Signatory Name field as your preferred name.</p> <p>Signatory Name *</p> <input data-bbox="354 936 727 993" 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>CC Organizations</p> <input data-bbox="354 1199 748 1262" type="text"/>	
8.	<p>From the Signatory Department dropdown, select “P-5 Financial Assurance Unit.”</p> <p>Signatory Department *</p> <input data-bbox="354 1472 743 1535" 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>CC People</p> <input data-bbox="354 1745 743 1808" type="text"/>	

10.	<p>Enter description to be able to identify this document at a later time.</p> <p>Description * ⓘ</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;">Example Correspondence</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>	Description
11.	<p>Complete the Correspondence Text field with the desired text to be sent to the Organization as the body of the text.</p> <p>Correspondence Text *</p> <div style="border: 1px solid #ccc; padding: 10px; min-height: 100px;"> <p>This is where you will enter the information that needs to be sent back to the filer.</p> </div>	Correspondence Text
12.	<p>Navigate back to the top of the step, click the “Ready to Send?” Checkbox.</p> <p><input checked="" type="checkbox"/> Ready to Send?</p> <p>Note:</p> <p>If this is not selected, the correspondence will not be sent.</p>	
13.	<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 style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-top: 10px;">Preview</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> 	

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.

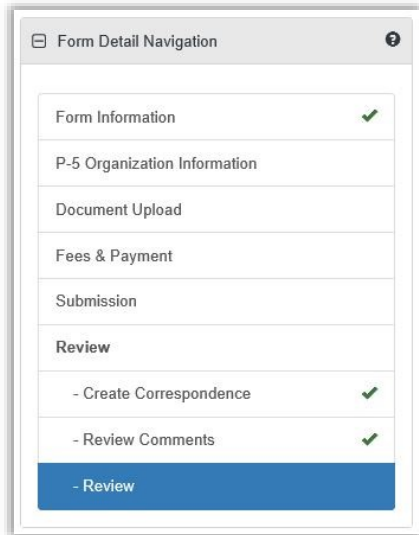


4.

Select the Next button to proceed to the next step.



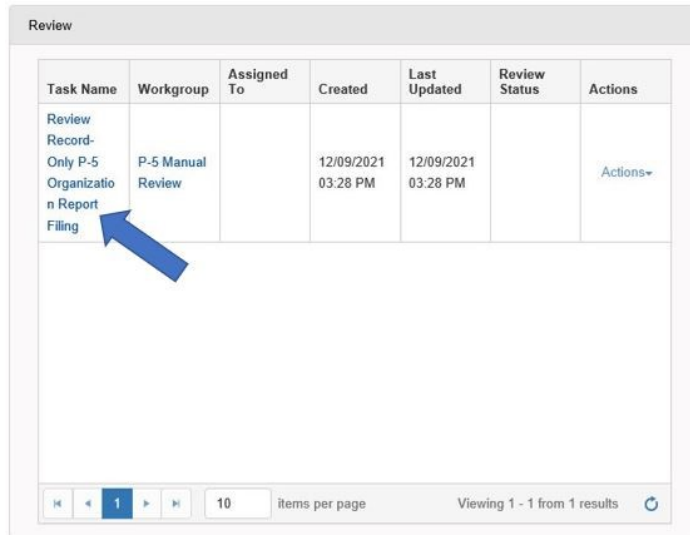
1.10.3 Review Step



- 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.

Step	Action	Required Fields														
1.	<p>The step is pre-populated with a review task to be completed.</p> <div data-bbox="342 1163 1230 1848" style="border: 1px solid #ccc; padding: 10px;"> <p>Review</p> <table border="1" data-bbox="380 1234 1192 1470"> <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 style="text-align: right;"> ◀ ▶ 1 ▶ ▶▶ </p> <p style="text-align: right;"> <input type="text" value="10"/> items per page </p> <p style="text-align: right;"> 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.



The screenshot shows a table titled "Review" with the following columns: Task Name, Workgroup, Assigned To, Created, Last Updated, Review Status, and Actions. The first row contains the following data: Task Name: "Review Record-Only P-5 Organization Report Filing", Workgroup: "P-5 Manual Review", Assigned To: (empty), Created: "12/09/2021 03:28 PM", Last Updated: "12/09/2021 03:28 PM", Review Status: (empty), and Actions: "Actions>". A blue arrow points to the "Task Name" cell. Below the table, there is a pagination bar showing "10 items per page" and "Viewing 1 - 1 from 1 results".

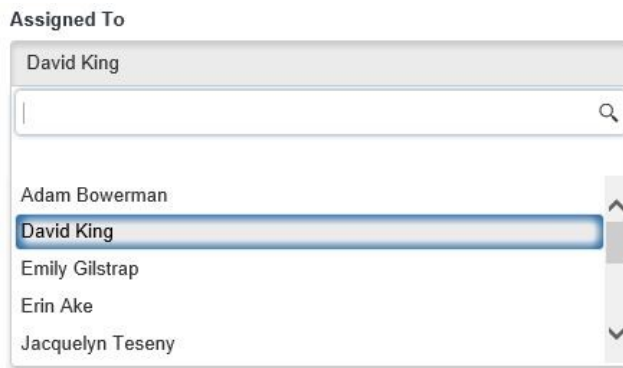
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
Review Record-Only P-5 Organization Report Filing	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		Actions>

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



The "Assigned To" dropdown menu is open, showing a search bar with "David King" entered. Below the search bar, a list of names is displayed: Adam Bowerman, David King (highlighted with a blue bar), Emily Gilstrap, Erin Ake, and Jacquelyn Teseny.

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



The "Due Date" field is labeled "Due Date *". It contains the date "12/15/2021" and a calendar icon on the right side.

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

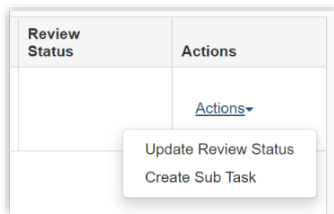


Assigned To, Due Date

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


Save

Update Status

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

No Yes

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.	Continue the process for the Managerial Workgroup Review task.	
9.	When workflow processing is complete, the P-5 Record Only filing will be updated.	