



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

Release 1 Software Design

# User Guide

## Financial Assurance Release

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## **COURSE OVERVIEW**

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### **Course Description**

This guide can be used to request a Financial Assurance Release in LoneSTAR.

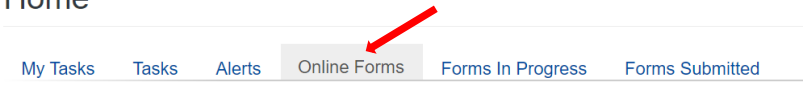
## 1.1 Launching the Form

### 1.1.1 Key Points

- User's 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 <b>Internal Landing</b> page.	
2.	Click the Online Forms tab. Home 	
3.	Select the Financial Assurance Release 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  
Financial Assurance Release

Organization \*

Financial Assurance \*

Description \*

Cancel Save & Continue

### 1.2.2 Steps to complete the Form Information step

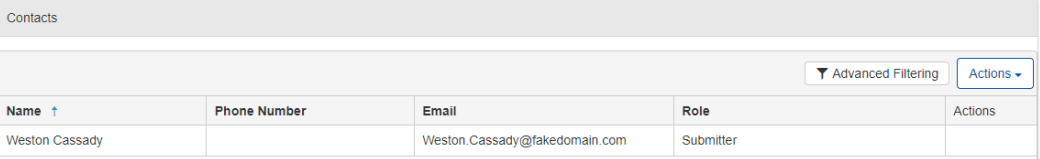
Step	Action	Required Fields
1.	Select the Organization associated with the Financial Assurance you are requesting to release. Organization *	
2.	The Financial Assurance dropdown field will now be populated with Financial Assurances associated to the Organization. Financial Assurance *	
3.	Select the Financial Assurance dropdown and select the Financial Assurance associated to a Well to be released with an Instrument Type of Bond. Note: If more information on the Financial Assurance is needed, navigate to the Financial Assurances list page.	
4.	If the Financial Assurance is associated to at least one well, you will be prompted to select the Well associated to the Financial Assurance to be released. Well Selection *  Note: The Financial Assurance Release form only releases one well at a time, multiple instances of them must be submitted if a Financial Assurance is associated to multiple wells and all wells must be released.	
5.	Enter a Description that will allow you to easily locate this particular form submission in the future. Description *	
6.	Click Save & Continue  Cancel Save & Continue  Note: At this point, this is now considered a form instance in LoneSTAR and the Form Information step can no longer be edited.	

## 1.3 Organization Information Step

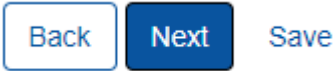
### 1.3.1 Key Points

- 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. <b>Organization Long Name</b> SKY RESOURCES, INC. <b>Organization Short Name</b> SKY RESOURCES, INC. <b>Organization Primary Address</b> PO BOX 1199 GRAHAM, Texas 76450 <b>Organization Primary Phone Number</b> (858) 699-3166	<b>Type of Organization</b> Corporation (Co., Inc., Corp., or Incorporated) <b>RRC Operator Number</b> 786408 <b>Ext</b>
3.	Below, the grid displays users who are associated to the form submission. 	

	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 Financial Assurance Information Step

### 1.4.1 Key Points

- Learn how to enter information on the Financial Assurance to be released.

### 1.4.2 Steps to complete the Financial Assurance Information step

Step	Action	Required Fields
1.	LoneSTAR will present information regarding the information as Read-Only fields with the textboxes greyed out.  	
2.	Select the Effective Instrument Release Date as today’s date. <b>Effective Instrument Release Date *</b>   Note: When the form is approved, the Instrument will be released. If the Effective Instrument Release Date as later than today’s date, the instrument will be set to “Released” on the selected date.	Effective Instrument Release Date

3.	<p>Complete the Reason for Instrument Release textbox.</p> <p>Reason for Instrument Release *</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <p>Note: This will be used by Internal Reviewers to determine if the instrument should be released.</p>	Reason for Instrument Release
4.	<p>To navigate to the next step, click "Next".</p> <div style="display: flex; gap: 10px;"> <span style="border: 1px solid #0070c0; padding: 2px 10px; border-radius: 3px;">Back</span> <span style="background-color: #0070c0; color: white; padding: 2px 10px; border-radius: 3px;">Next</span> <span style="padding: 2px 10px;">Save</span> </div>	

## 1.5 Document Upload Step

### 1.5.1 Key Points

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

Form Information ✓ Organization Information ✓ Financial Assurance Information ✓ Document Upload Form Submit Confirmation Review

Form Detail Navigation

- Form Information ✓
- Organization Information ✓
- Financial Assurance Information ✓
- Document Upload**
- Form Submit
- Confirmation
- Review

Document Upload

Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Uploaded Documents

Advanced Filtering
Actions

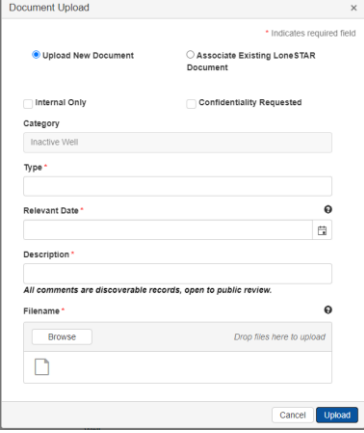

Upload Date	Uploaded By	Description	Filename	Actions
No results to display				

0
20 items per page

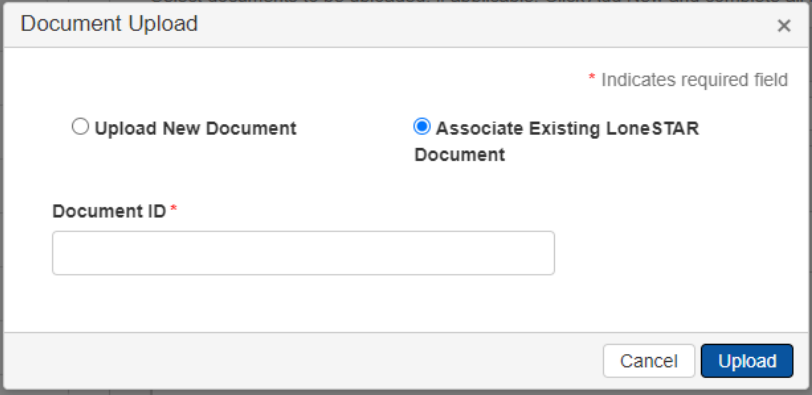
Back Next Save

### 1.5.2 Steps to complete the Document Upload step

Step	Action	Required Fields										
1.	<p>To upload a new document, click the grid-level actions menu and select to Add New.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Uploaded Documents</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Advanced Filtering</span> <span>Actions</span> <input style="width: 100px;" type="text" value="Search"/> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Upload Date</th> <th style="width: 15%;">Uploaded By</th> <th style="width: 40%;">Description</th> <th style="width: 20%;">Filename</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="height: 100px;"> <div style="position: absolute; top: 50px; right: 50px; border: 1px solid #ccc; padding: 5px; background-color: white;"> <ul style="list-style-type: none"> <li>Add New</li> <li>Export - Excel</li> </ul> </div> </td> </tr> </tbody> </table> </div>	Upload Date	Uploaded By	Description	Filename	Actions	<div style="position: absolute; top: 50px; right: 50px; border: 1px solid #ccc; padding: 5px; background-color: white;"> <ul style="list-style-type: none"> <li>Add New</li> <li>Export - Excel</li> </ul> </div>					
Upload Date	Uploaded By	Description	Filename	Actions								
<div style="position: absolute; top: 50px; right: 50px; border: 1px solid #ccc; padding: 5px; background-color: white;"> <ul style="list-style-type: none"> <li>Add New</li> <li>Export - Excel</li> </ul> </div>												
2.	You will be presented with the Document Upload dialog.											

		
3.	<p>The user can choose to upload a new document or associate an existing document.</p> <p><input checked="" type="radio"/> <b>Upload New Document</b>                      <input type="radio"/> <b>Associate Existing LoneSTAR Document</b></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. Select a type of “Copy of Original Bond”, 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;"> <p style="text-align: center;">Browse <span style="float: right;">Drop files here to upload</span></p> <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;"> <p style="text-align: center;">Browse <span style="float: right;">✓ Done</span></p> <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px; display: flex; align-items: center; justify-content: center;"> <p style="margin: 0;">Sample.Upload.xlsx 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="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Upload"/> </div>	
9.	<p>If instead of uploading a new document, an existing document can be associated.</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> <div style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Upload"/> </div>	
11.	<p>To navigate to the next step, click “Next”.</p> <div style="text-align: right;"> <input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Save"/> </div>	

## 1.6 Form Submit and Confirmation Steps

### 1.6.1 Key Points

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

Form Information ✓ Organization Information ✓ Financial Assurance Information ✓ Document Upload ✓ **Form Submit** Confirmation Review

Form Detail Navigation

- Form Information ✓
- Organization Information ✓
- Financial Assurance Information ✓
- Document Upload ✓
- Form Submit**
- Confirmation
- Review

### Form Submit

Online Form Association

Form ID	Form Category	Title	Description	Actions
<a href="#">Actions</a>				

Comments

[Actions](#)

« ◀ 0 ▶ » 20 items per page No results to display

Internal Only? [Add](#)

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

Acknowledgement

**Submitter**

**Submitter Title \***

**Date Received \***

I hereby certify all statements made in this form are, to the best of my knowledge, true, correct, and complete. \*

Form Submit Preview

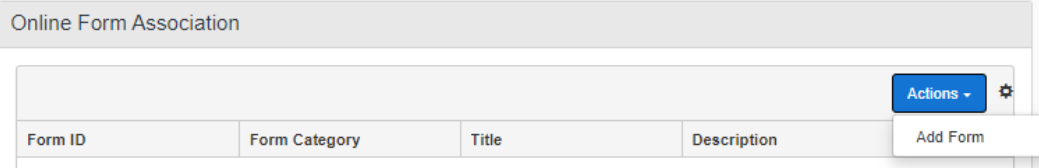
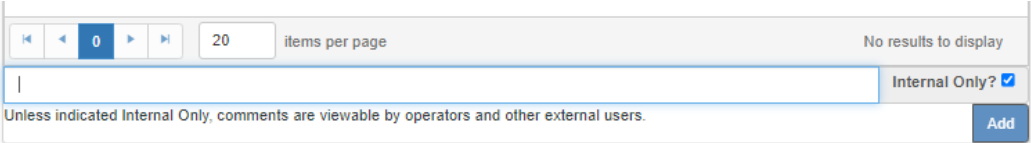
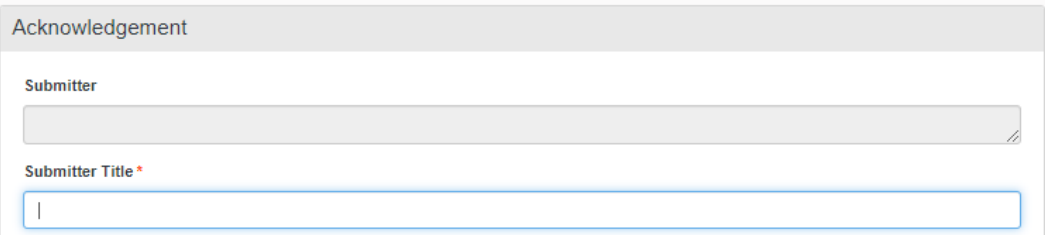

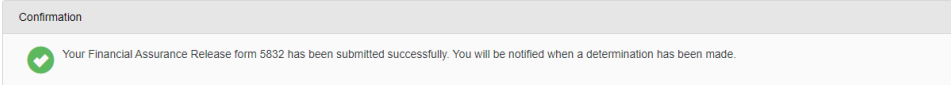
Click the button below to preview your submission summary.

[Preview Submission Summary](#)

[Back](#) [Submit](#) [Save](#)

### 1.6.2 Steps to complete the Form Submit step

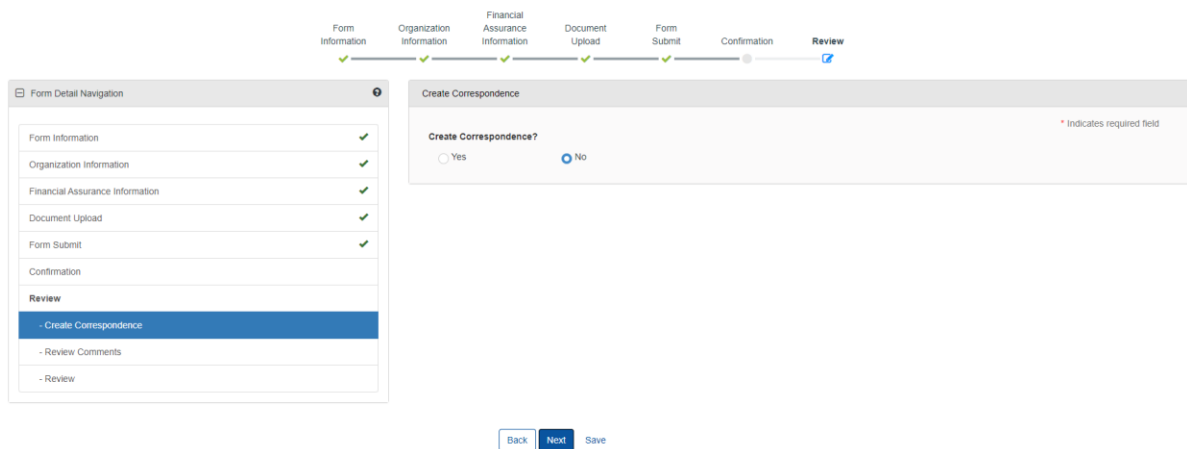
Step	Action	Required Fields
1.	To associate an existing online form to be part of this form submission, you can select the Add Form action and select the form from the subsequent dialog.	

		
2.	<p>To add a comment, enter the text of the comment in the comment textbox and press the Add button.</p>  <p>Note: Selecting a comment to be internal only will only allow RRC Users to view the comment.</p>	
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>	

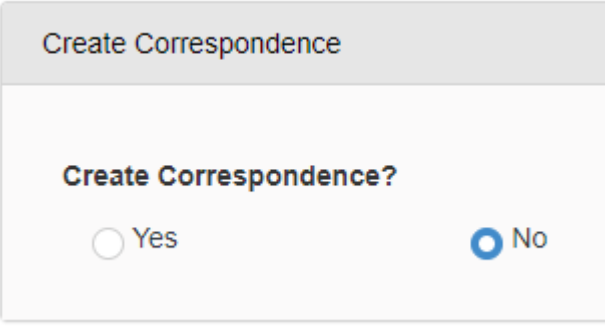
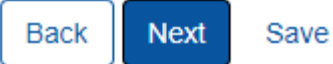
## 1.7 Create Correspondence Step

### 1.7.1 Key Points

- Learn how to complete the Create Correspondence Step.



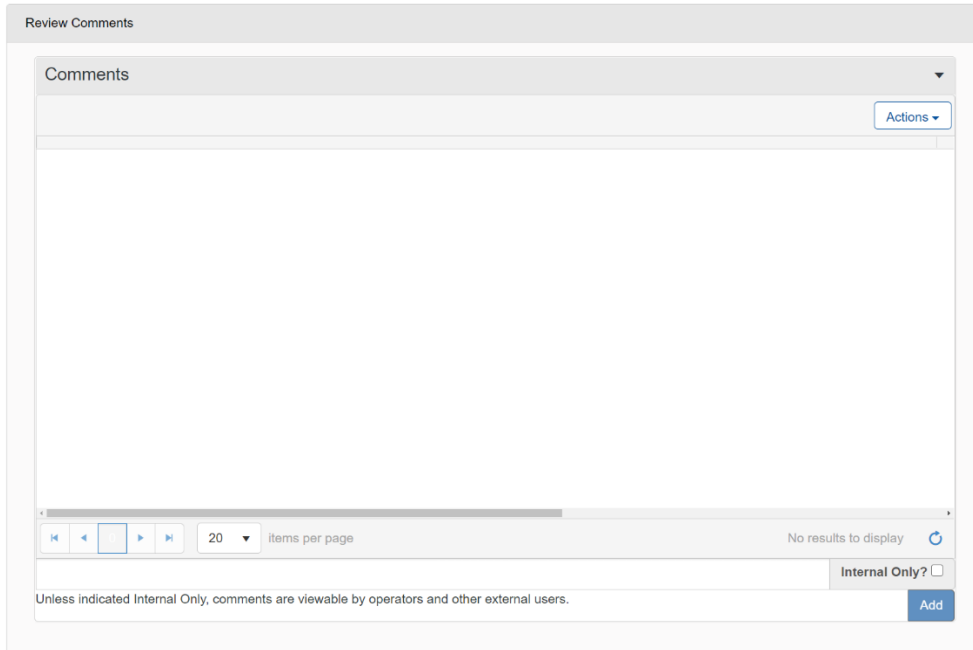
### 1.7.2 Steps to complete the Form Submit step

Step	Action	Required Fields
1.	For the purpose of this guide, a correspondence will not be generated.	
2.	Select the “No” radio button option and no additional steps are required. 	
3.	Select the Next button to proceed to the next step. 	

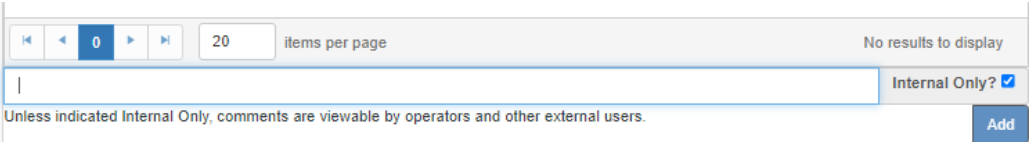

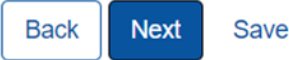
## 1.8 Review Comments Step

### 1.8.1 Key Points

- Learn how to complete the Review Comments Step.



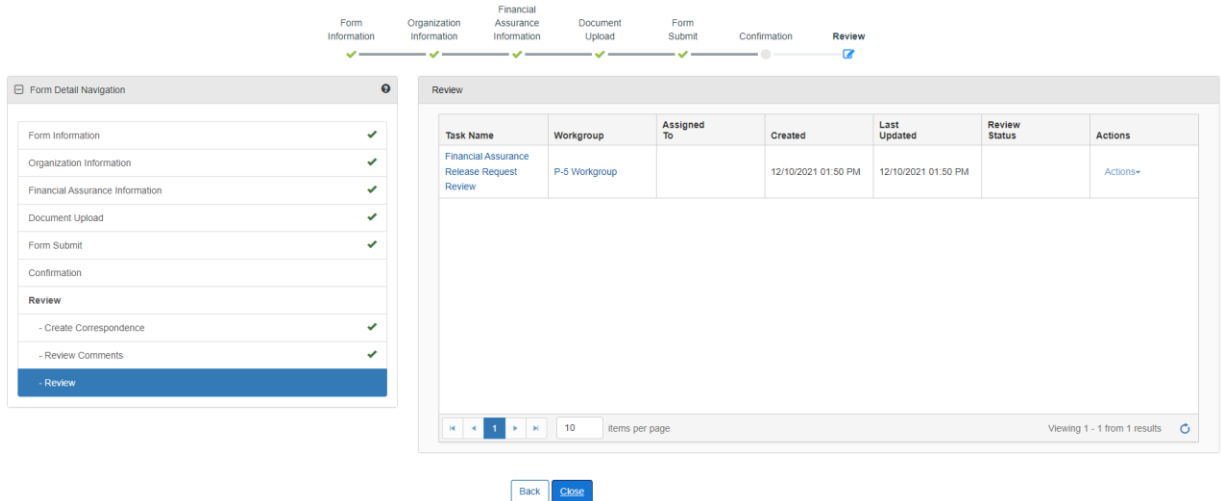
### 1.8.2 Steps to complete the Review Comments step

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.



### 1.9.2 Steps to complete the Review step

Step	Action	Required Fields														
1.	<p>The step is pre-populated with a review task to be completed.</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>Financial Assurance Release Request Review</td> <td>P-5 Workgroup</td> <td></td> <td>12/10/2021 01:50 PM</td> <td>12/10/2021 01:50 PM</td> <td></td> <td>Actions&gt;</td> </tr> </tbody> </table>	Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions	Financial Assurance Release Request Review	P-5 Workgroup		12/10/2021 01:50 PM	12/10/2021 01:50 PM		Actions>	
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions										
Financial Assurance Release Request Review	P-5 Workgroup		12/10/2021 01:50 PM	12/10/2021 01:50 PM		Actions>										
2.	<p>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.</p> <div style="border: 1px solid gray; padding: 5px;"> <p><b>Task Name</b></p> <p><a href="#">Financial Assurance Release Request Review</a></p> </div>															
3.	<p>assign the task to yourself, select the Edit button at the bottom</p> <div style="border: 1px solid gray; padding: 5px;"> <p>se <input type="button" value="Edit"/></p> <p>the “Assigned To” dropdown, select your name from the list</p> <p>Assigned To</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Search</p> <p>Souza</p> <p>Bennett</p> <p>Gaikwad</p> <p>pitsiauri</p> <p>Cassady</p> </div> </div>	Assigned To, Due Date														

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

Due Date \*  
12/10/2021

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

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
Financial Assurance Release Request Review	P-5 Workgroup	Weston Cassady	12/10/2021 01:50 PM	12/10/2021 01:56 PM		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.

Actions

- Update Review Status
- Create Sub Task

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.

Update Review Status

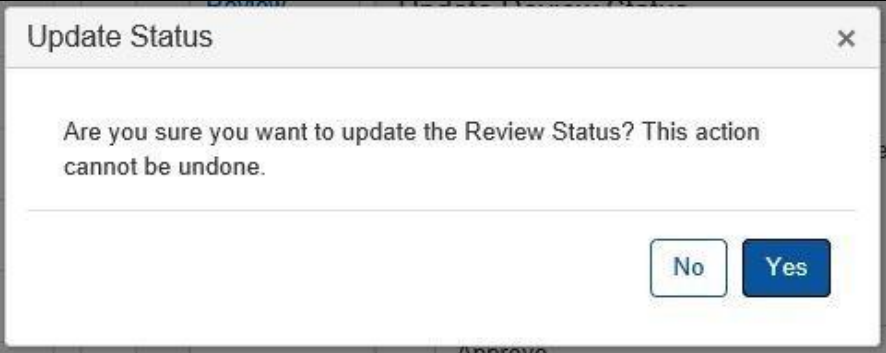

**Task Name**  
Financial Assurance Release Request Review

**Assigned To**  
Weston Cassady

**Review Status \***

- Pass
- Return

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>  <p>Background Process for Form ID 5832 is still processing. Please refresh the page to view the current status.</p>	
8.	Continue the process for the Managerial Workgroup Review task.	
9.	When workflow processing is complete, the Financial Assurance will be released.	