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

Release 1 Software Design

# User Guide

## Financial Assurance Release

# Table of Contents



# COURSE OVERVIEW

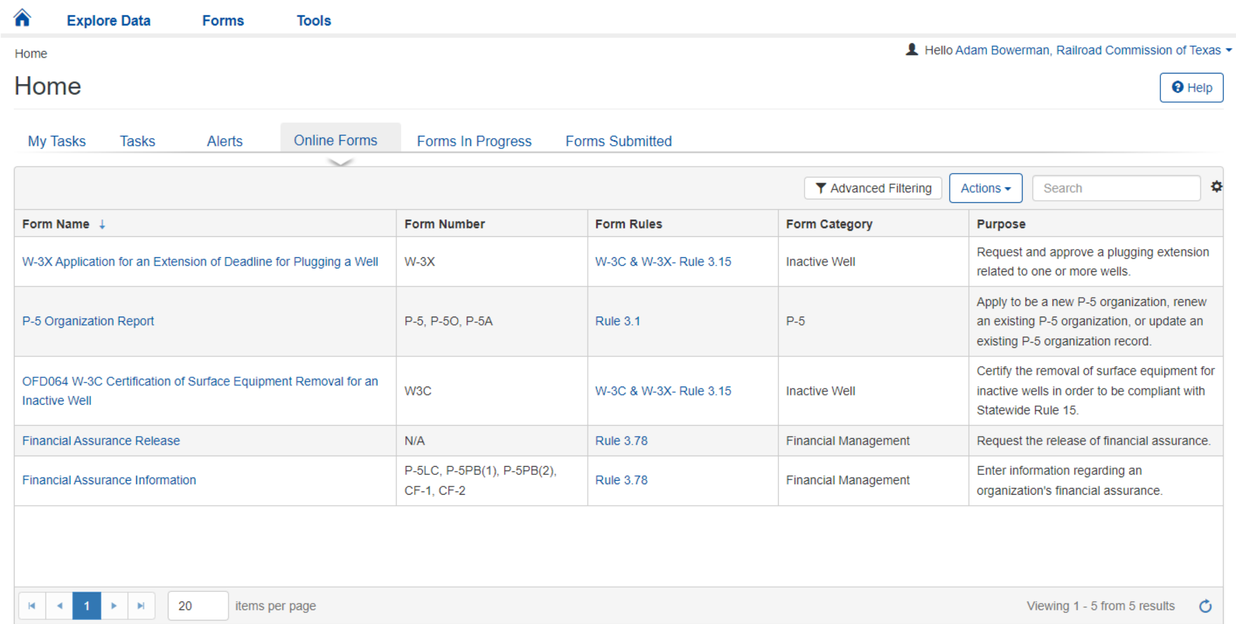
## Course Description

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

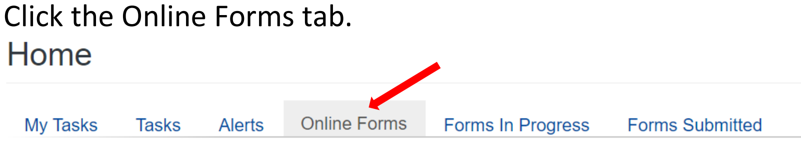
## 1.1 Launching the Form

### 1.1.1 Key Points

- User's with sufficient security roles can launch the form.



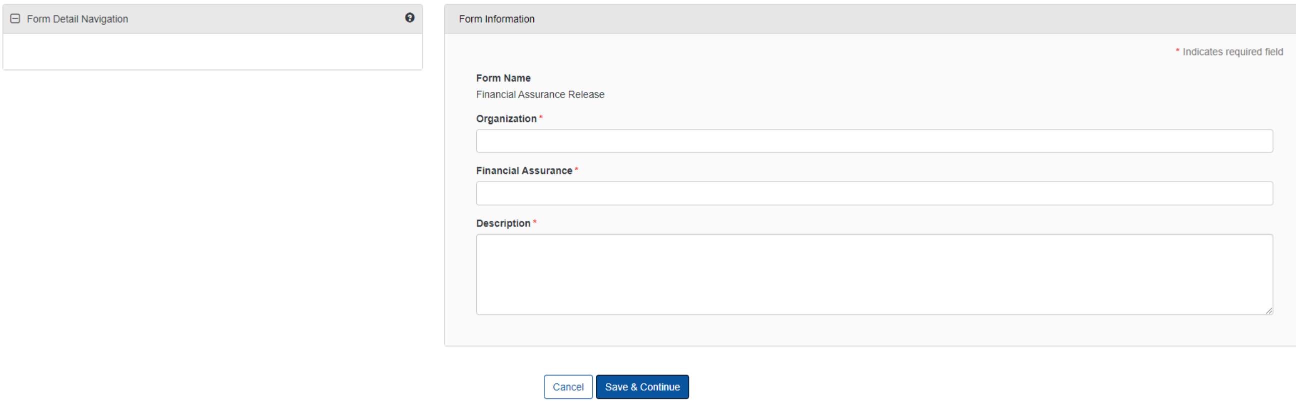

### 1.1.2 Steps to launch the form

| Step | Action | Required Fields |
|---|---|---|
| 1. | Navigate to the **Internal Landing** page. | |
| 2. | Click the Online Forms tab.<br> | |
| 3. | Select the Financial Assurance Release form name. | |

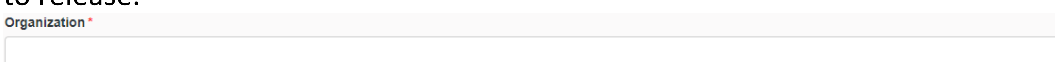
## 1.2 Form Information Step

### 1.2.1 Key Points

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



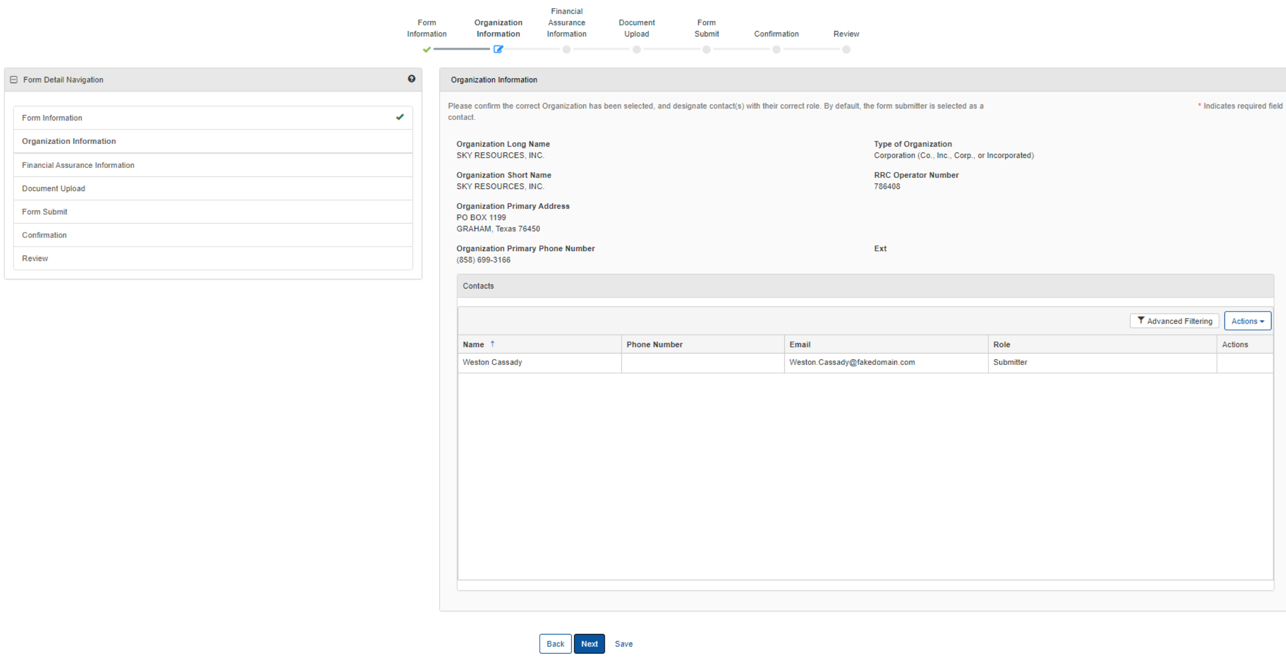

### 1.2.2 Steps to complete the Form Information step

| Step | Action | Required Fields |
|---|---|---|
| 1. | Select the Organization associated with the Financial Assurance you are requesting to release.  | |
| 2. | The Financial Assurance dropdown field will now be populated with Financial Assurances associated to the Organization.  | |
| 3. | Select the Financial Assurance dropdown and select the Financial Assurnace associated to a Well to be released with an Instrument Type of Bond.<br>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 orompted to select the Well associated to the Financial Assurance to be released.  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.  | |
| 6. | Click 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. | |

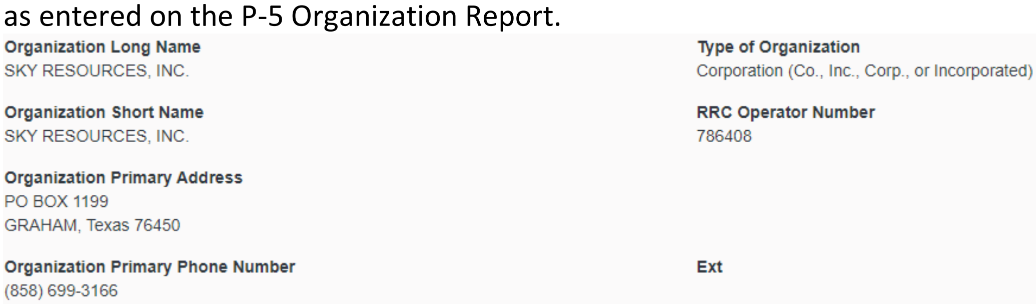
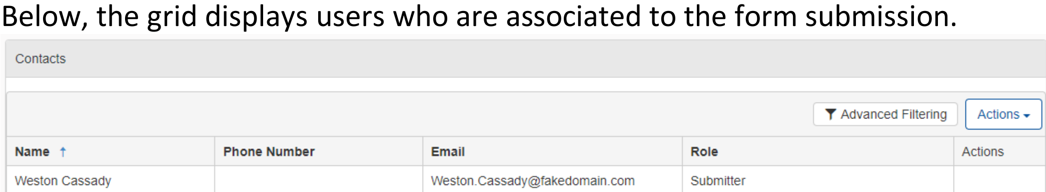
## 1.3 Organization Information Step

### 1.3.1 Key Points

- Learn how to confirm Organization Information.




### 1.3.2 Steps to complete the Organization Information step

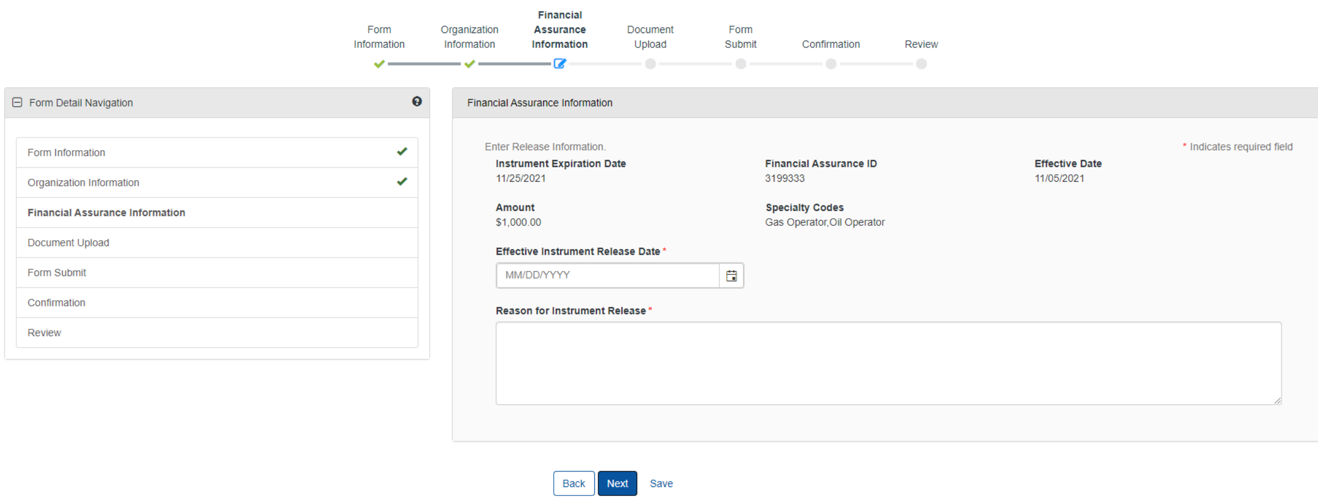
| Step | Action | Required Fields |
|---|---|---|
| 1. | LoneSTAR will present the Organization Information step pre-populated with information based on the most recently approved P-5 Organization Report for the associated to Organization. | |
| 2. | The first information presented includes the information for the organization itself as entered on the P-5 Organization Report.   | |
| 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”.<br>Back Next Save | |

## 1.4 Financial Assurance Information Step

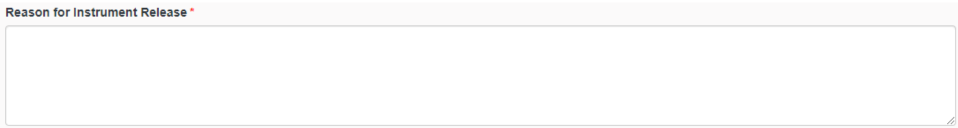
### 1.4.1 Key Points

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




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

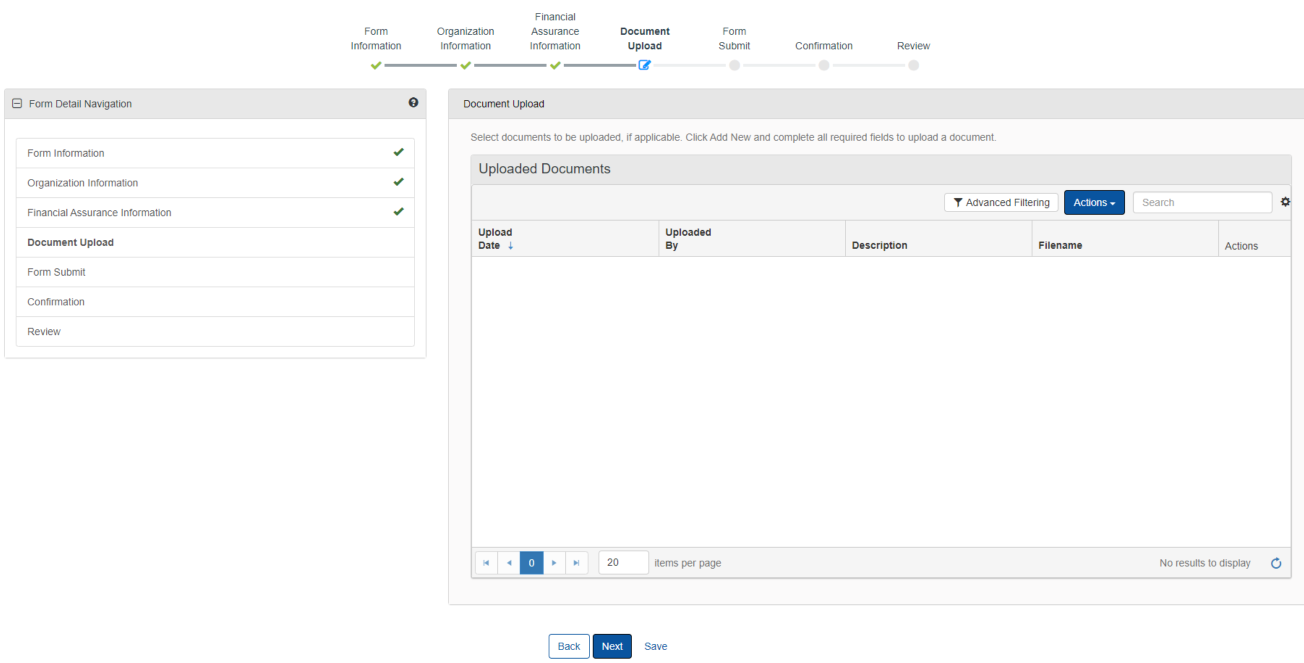
| Step | Action | Required Fields |
|---|---|---|
| 1. | LoneSTAR will present information regarding the information as Read-Only fields with the textboxes greyed out.<br>Enter Release Information.<br>**Instrument Expiration Date** 11/25/2021 · **Financial Assurance ID** 3199333 · **Effective Date** 11/05/2021<br>**Amount** $1,000.00 · **Specialty Codes** Gas Operator,Oil Operator | |
| 2. | Select the Effective Instrument Release Date as today’s date.<br>**Effective Instrument Release Date** *<br>MM/DD/YYYY<br>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. | Complete the Reason for Instrument Release textbox.<br><br><br>Note: This will be used by Internal Reviewers to determine if the instrument should be released. | Reason for Instrument Release |
| 4. | To navigate to the next step, click “Next”.<br><br> | |

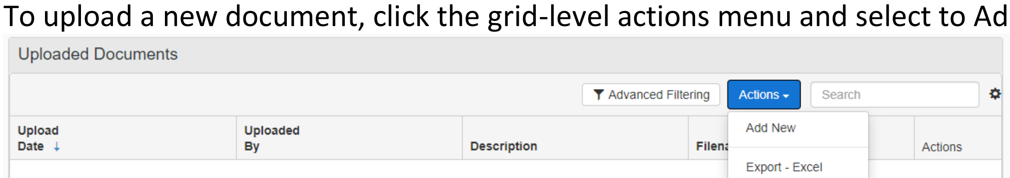
## 1.5 Document Upload Step

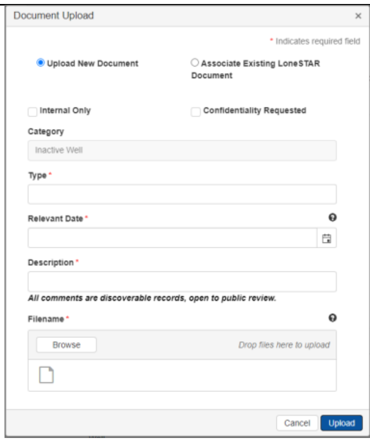
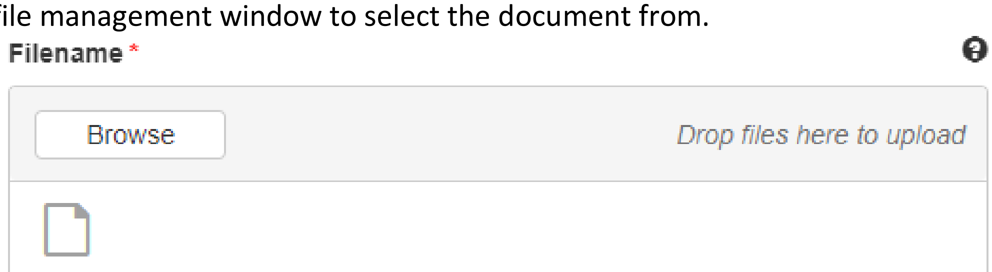
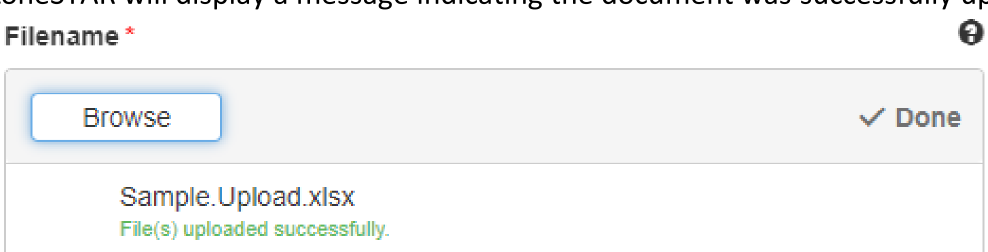
### 1.5.1 Key Points

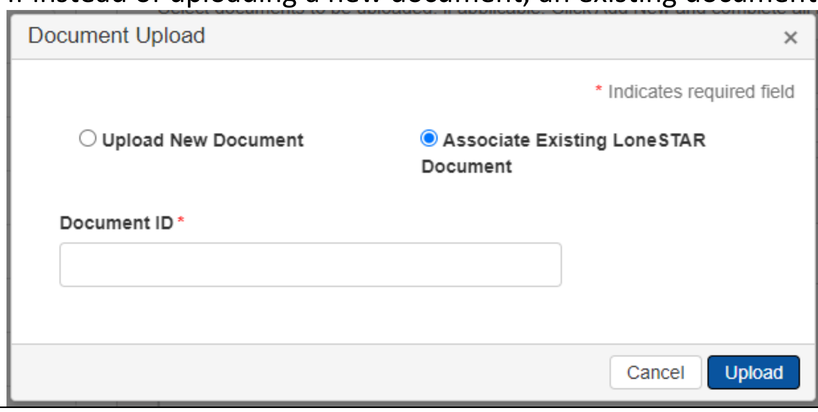
- Learn how to upload various documents to be part of the online form submission.




### 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.<br><br> | |
| 2. | You will be presented with the Document Upload dialog. | |

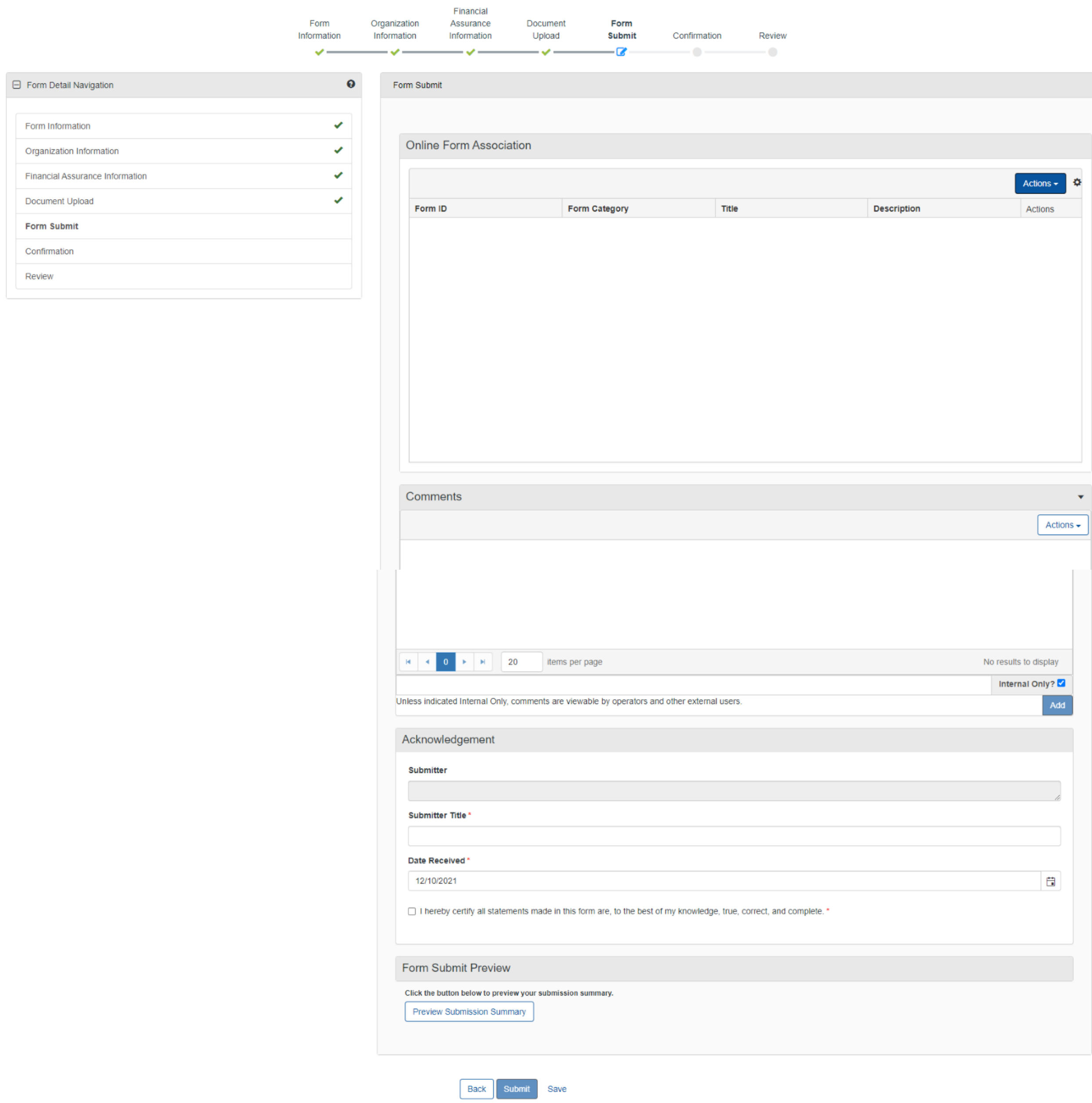
<table>
<tr><td></td><td>
</td><td></td></tr>
<tr><td>3.</td><td>The user can choose to upload a new document or associate an existing document.<br>
<br>Note: To associate an existing document, the document must have been uploaded as part of a previously approved form associated to the organization in context.</td><td></td></tr>
<tr><td>4.</td><td>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.</td><td></td></tr>
<tr><td>5.</td><td>To upload the document itself, select the Browse button. You will be presented with your file management window to select the document from.<br>
</td><td></td></tr>
<tr><td>6.</td><td>Double click the document you would like to upload and the selected document will display in the Document Uplaod dialog.</td><td></td></tr>
<tr><td>7.</td><td>LoneSTAR will display a message indicating the document was successfully uploaded.<br>
</td><td></td></tr>
<tr><td>8.</td><td>Select Upload and the document will now display in the grid and will be associated to the form submission.</td><td></td></tr>
</table>

| | | |
|---|---|---|
| |  | |
| 9. | If instead of uploading a new document, an existing document can be associated.<br> | |
| 10. | The Document ID dropdown will display a list of documents that can be associated. Select the desired document and click Upload and the document will now display in the grid and will be associated to the form submission.<br> | |
| 11. | To navigate to the next step, click “Next”.<br> | |

## 1.6 Form Submit and Confirmation Steps

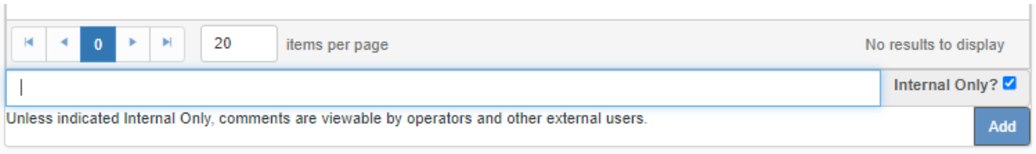
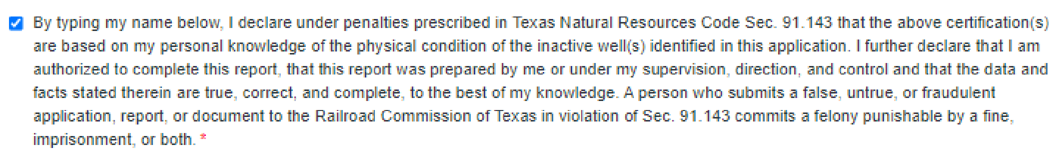
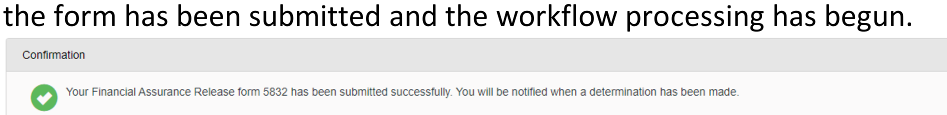
### 1.6.1 Key Points

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




### 1.6.2 Steps to complete the Form Submit step

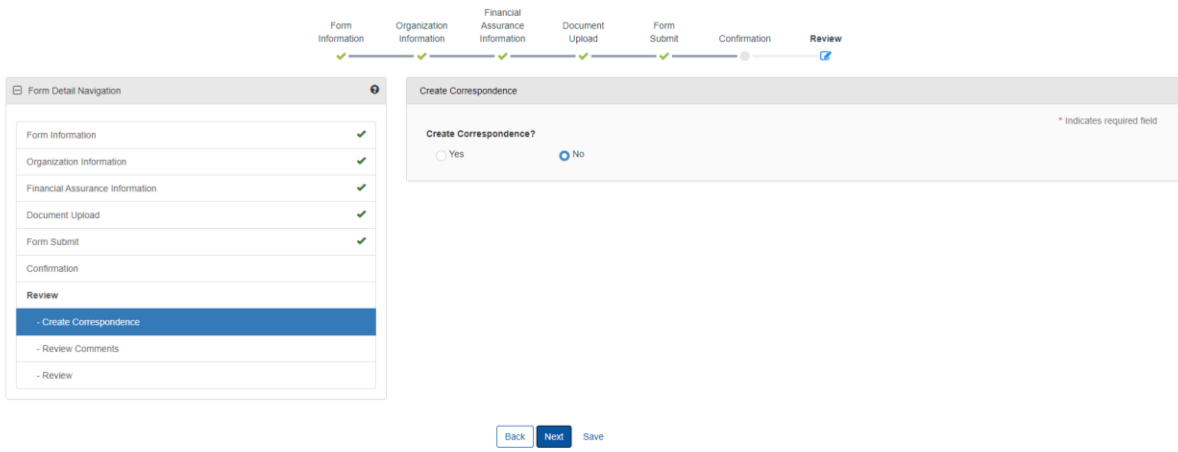
| Step | Action | Required Fields |
|---|---|---|
| 1. | To associate an existing online form to be part of this form submission, you can select the Add Form action and select the form from the subsequent dialog. | |

| | | |
|---|---|---|
| |  | |
| 2. | To add a comment, enter the text of the comment in the comment textbox and press the Add button.<br><br>Note: Selecting a comment to be internal only will only allow RRC Users to view the comment. | |
| 3. | In the Acknowledgement section, the user must enter their submitter title and indicate the date this form was received.<br> | Submitter Title, Date Received |
| 4. | Select the certification checkbox.<br> | Certification Checkbox |
| 5. | Select the Submit button to submit the form.<br><br>Note: The Submit button is deactivated until all required fields are completed on this step. | |
| 6. | When the form is submitted, the Confirmation message will be displayed to indicate the form has been submitted and the workflow processing has begun.<br><br>Note:<br>• Refreshing the page will display if the workflow processing has been completed.<br>• Once the form has been submitted, External Users can no longer edit the form. | |

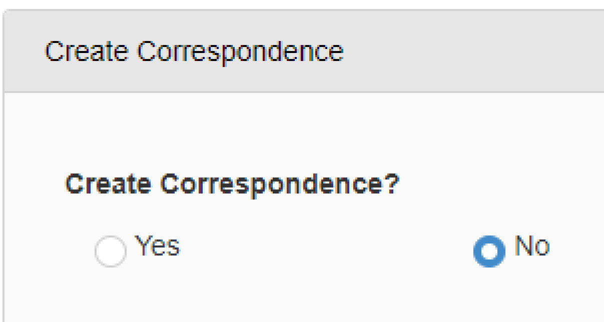
## 1.7 Create Correspondence Step

### 1.7.1 Key Points

- Learn how to complete the Create Correspondence Step.



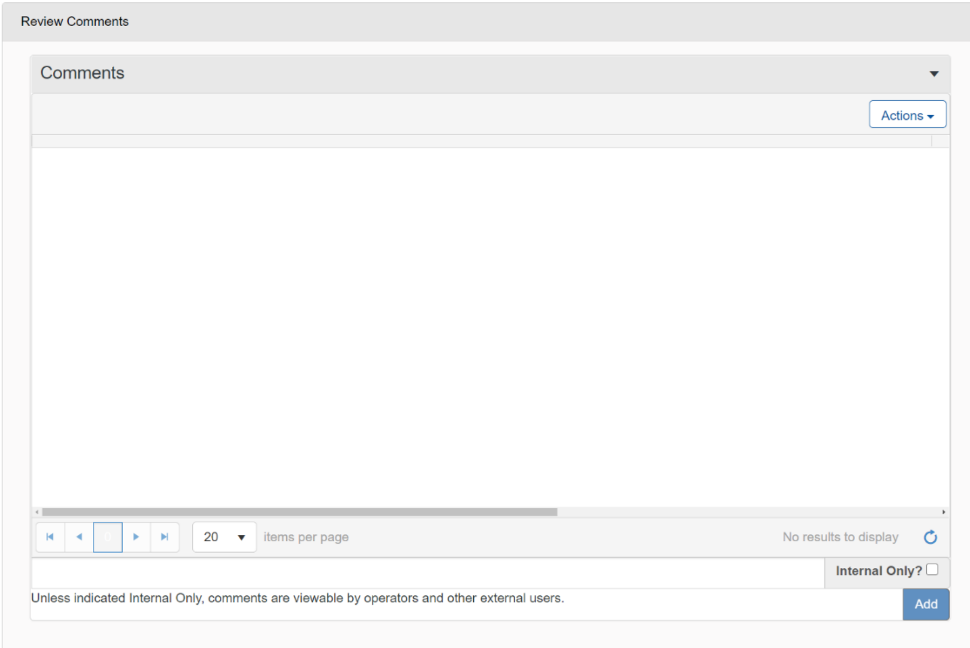

### 1.7.2 Steps to complete the Form Submit step

| 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.<br><br> | |
| 3. | Select the Next button to proceed to the next step.<br><br> | |

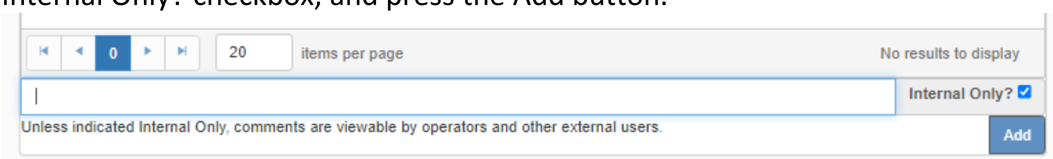
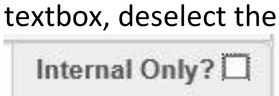
## 1.8 Review Comments Step

### 1.8.1 Key Points

- Learn how to complete the Review Comments Step.



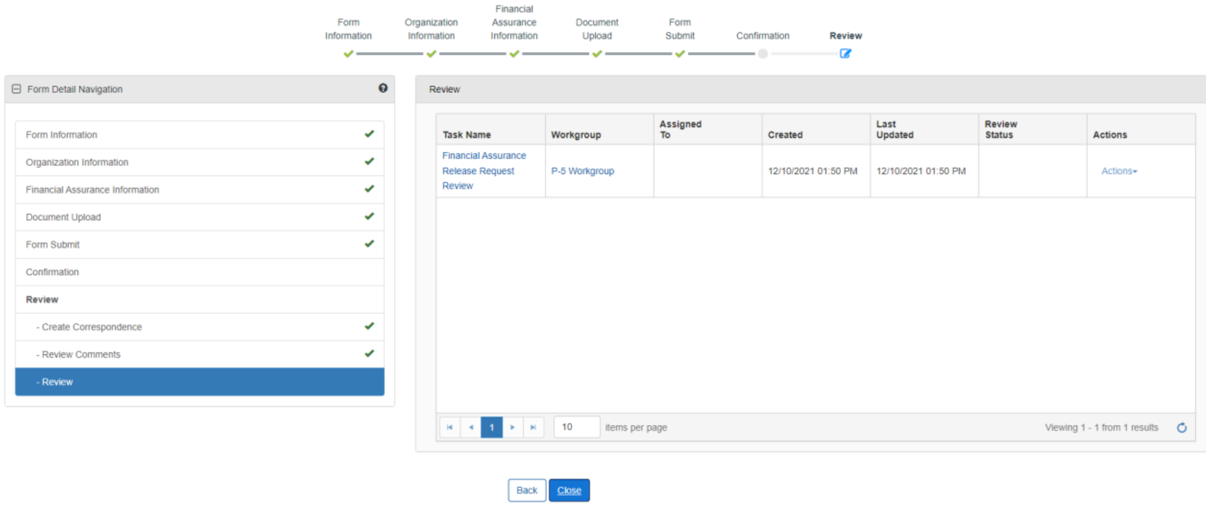

### 1.8.2 Steps to complete the Review Comments step

| Step | Action | Required Fields |
|---|---|---|
| 1. | To add a comment, enter the text of the comment in the comment textbox, select Internal Only? checkbox, and press the Add button.<br><br><br>Note:<br>• Internal Only comments will only be viewable by Internal Users.<br>• 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.<br><br> | |
| 3. | Select the Next button to proceed to the next step.<br><br> | |

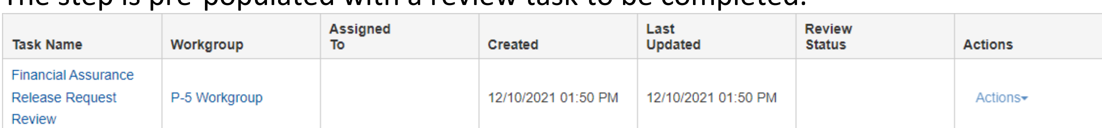
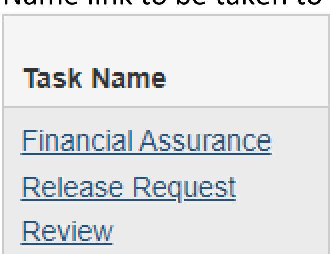
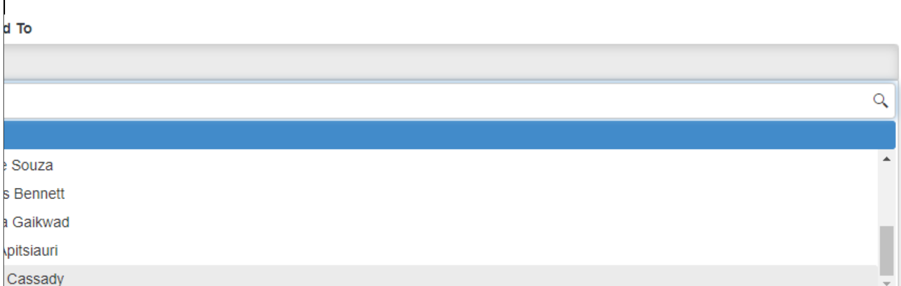
## 1.9 Review Step

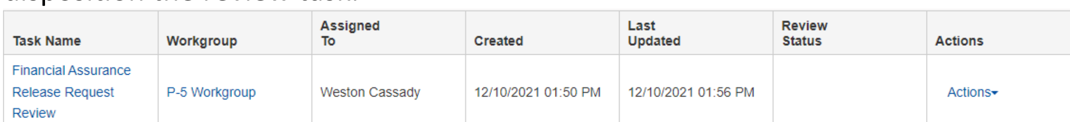
### 1.9.1 Key Points

- Learn how to complete the Review Step.

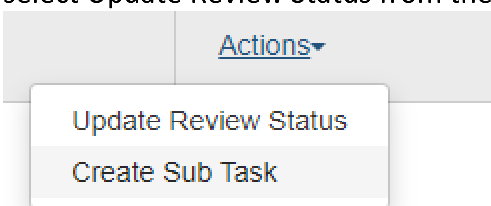
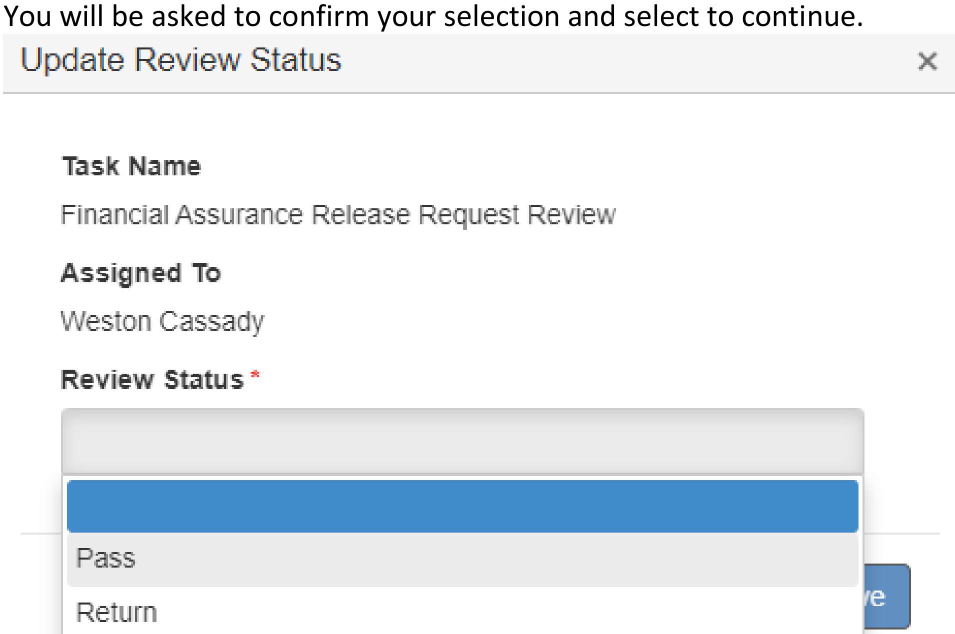


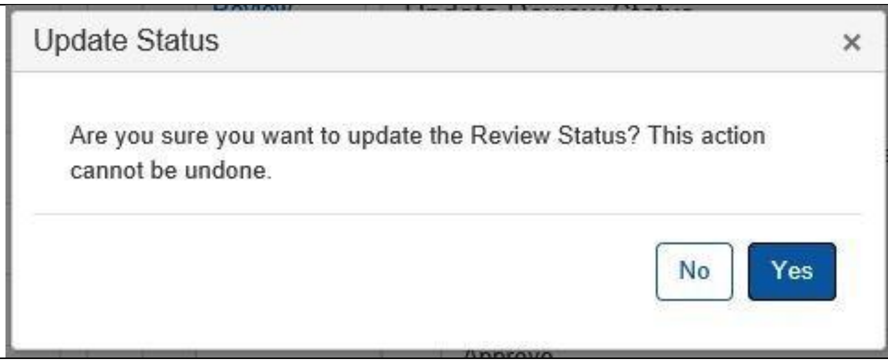
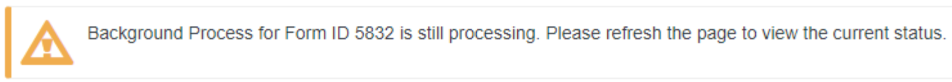

### 1.9.2 Steps to complete the Review step

<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>The step is pre-populated with a review task to be completed.<br>
</td><td></td></tr>
<tr><td>2.</td><td>Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.<br>
</td><td></td></tr>
<tr><td>3.</td><td>assign the task to yourself, select the Edit button at the bottom<br>
<br>the “Assigned To” dropdown, select your name from the list<br>
</td><td>Assigned To, Due Date</td></tr>
</table>

<table>
<tr><td></td><td>t a Due Date (type manually or use the calendar button at right)<br><br><br>lect Save (you will be taken back to the Review Step of the Form)<br><br></td><td></td></tr>
<tr><td>4.</td><td>Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.<br><br>

| 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 |

</td><td></td></tr>
<tr><td>5.</td><td>For the purpose of this guide, we are going to choose to Approve the form. To do so, select Update Review Status from the dropdown.<br><br></td><td></td></tr>
<tr><td>6.</td><td>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.<br><br></td><td>Review Status</td></tr>
</table>

| | | |
|---|---|---|
| |  | |
| 7. | Workflow processing will begin and you will be notified that you can refresh the page to view the updated status.  | |
| 8. | Continue the process for the Managerial Workgroup Review task. | |
| 9. | When workflow processing is complete, the Financial Assurance will be released. | |