



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

Release 1 Software Design

User Guide

Financial Assurance Information

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COURSE OVERVIEW

Course Description

This guide can be used to submit a maintain instance of a Financial Assurance Information form in LoneSTAR.

1.1 Launching the Form

1.1.1 Key Points

- Users with sufficient security roles can launch the form. (See 'User Guide General LoneSTAR' for more info on how to update security roles)

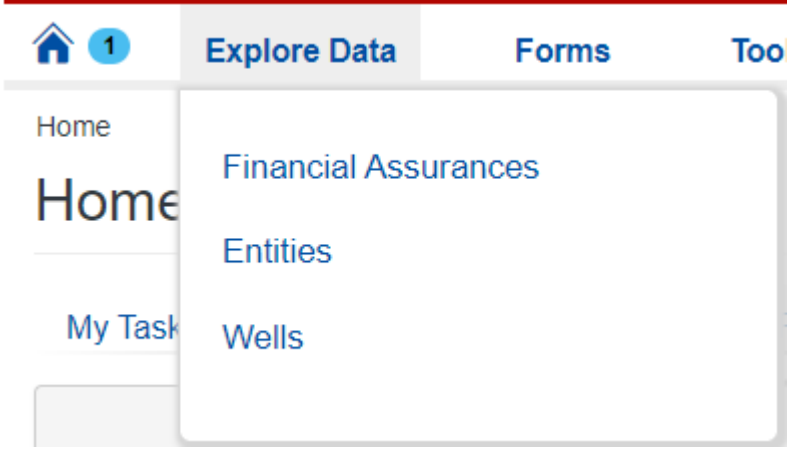

Financial Assurance Detail

Help

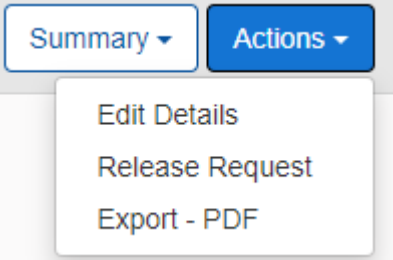
DIAMONDBACK E&P LLC - W-3X Option C - Blanket Well - Financial Assurance ID - 3199318 Summary Actions

| | | | |
|---|--|--|--|
| Organization Name DIAMONDBACK E&P LLC | Financial Assurance ID 3199318 | Financial Assurance Status Approved | Instrument Type Cash |
| Amount Required \$0.00 | Instrument Value \$50,000.00 | Financial Assurance Purpose W-3X Option C - Blanket Well | Commercial Facility Number N/A |
| Amount Applied Towards Wells N/A | | | |
| RMS Register Number 789 | Check Number N/A | Date Received 9/27/2021 | |
| Effective Date 9/28/2021 | Expiration Date N/A | Reason for Transfer N/A | |
| Reason for Release/Refund N/A | | Does the Letter of Credit include an evergreen clause? N/A | |
| Surety Name N/A | Surety Number N/A | Surety Address N/A | |

1.1.2 Steps to launch the form

| Step | Action | Required Fields |
|------|--|-----------------|
| 1. | <p>Select the Explore Data menu and select Financial Assurances.</p>  | |
| 2. | <p>Navigate to the Financial Assurance Detail page for the Financial Assurance you would like to modify the details of by selecting the Financial Assurance ID Column. For the purpose of this example, locate a Financial Assurance with a Financial Assurance Purpose of W-3X Option C – Blanket Well and an Instrument Type of Bond.</p>  | |

| | | |
|----|--|--|
| 3. | Click the Page-level Actions Menu and select Edit Details. | |
| 4. | A new form will be launched. | |



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 Information

Organization
GLORI ENERGY HOLDINGS INC.

Financial Assurance Purpose *
W-3X Option C - Blanket Well

Instrument Type *
Bond

Specialty Codes
Drilling Permit Activity Indicator

Description *

Cancel Save & Continue

1.2.2 Steps to complete the Form Information step

| Step | Action | Required Fields |
|------|--|-----------------|
| 1. | The Organization, Financial Assurance Purpose, Instrument Type, and Specialty Codes will be pre-populated. | |

| | | |
|----|---|-------------|
| | <p>Form Name Financial Assurance Information</p> <p>Organization GLORI ENERGY HOLDINGS INC.</p> <p>Financial Assurance Purpose *</p> <p>W-3X Option C - Blanket Well</p> <p>Instrument Type *</p> <p>Bond</p> <p>Specialty Codes</p> <p>Drilling Permit Activity Indicator</p> | |
| 2. | <p>Enter a Description that will allow you to easily locate this particular form submission in the future.</p> <p>Description *</p> <p></p> | Description |
| 3. | <p>Click Save & Continue</p> <p>Cancel Save & Continue</p> <p>Note: At this point, this is now considered a form instance in LoneSTAR and the Form Information step can no longer be edited.</p> | |

1.3 Organization Information Step

1.3.1 Key Points

- Learn how to confirm Organization Information.

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

Organization Information

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

Organization Long Name
 GLORI ENERGY HOLDINGS INC.

Type of Organization
 Corporation (Co., Inc., Corp., or Incorporated)

Organization Short Name
 GLORI ENERGY HOLDINGS INC.

RRC Operator Number
 310672

Organization Primary Address
 4315 SOUTH DRIVE
 Houston, Texas 77053

Organization Primary Phone Number
 (713) 237-8880

Ext

Contacts

| Name ↑ | Phone Number | Email | Role | Actions |
|----------------|--------------|-------------------------------|-----------|---------|
| Weston Cassidy | | Weston.Cassady@fakedomain.com | Submitter | |

Back Next Save

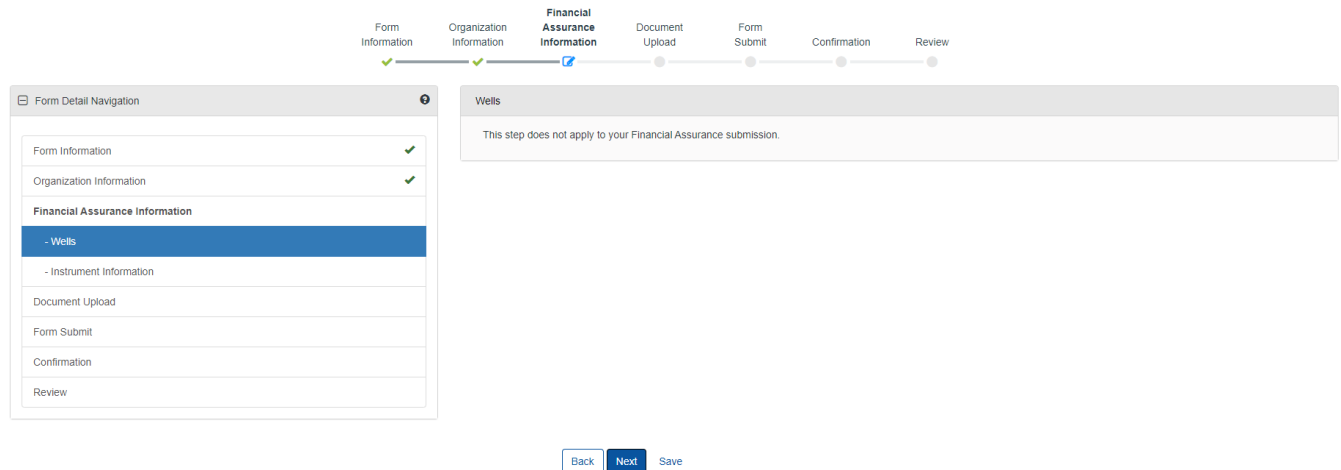
1.3.2 Steps to complete the Organization Information step

| 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 Organization. | |
| 2. | <p>The first information presented includes the information for the organization itself as entered on the P-5 Organization Report.</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> Organization Long Name GLORI ENERGY HOLDINGS INC. </p> <p> Type of Organization Corporation (Co., Inc., Corp., or Incorporated) </p> <p> Organization Short Name GLORI ENERGY HOLDINGS INC. </p> <p> RRC Operator Number 310672 </p> <p> Organization Primary Address 4315 SOUTH DRIVE Houston, Texas 77053 </p> <p> Organization Primary Phone Number (713) 237-8880 </p> <p> Ext </p> | |
| 3. | <p>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.</p> | |
| 4. | <p>To navigate to the next step, click “Next”.</p> <p>Back Next Save</p> | |

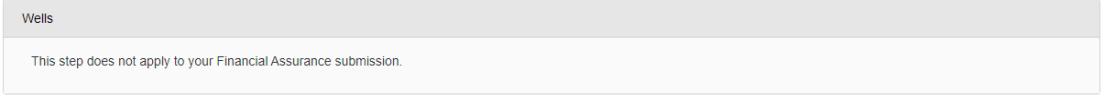

1.4 Wells Step

1.4.1 Key Points

- Learn to view the content on this step.



1.4.2 Steps to complete the Wells step

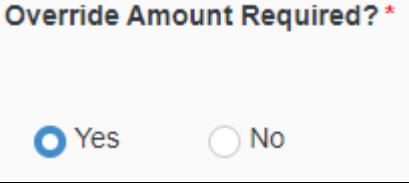
| Step | Action | Required Fields |
|------|---|-----------------|
| 1. | This step will display differently based on the information selected on the Financial Assurance information step. | |
| 2. | Because of the selections, this step will only display a message indicating it does not apply to this Financial Assurance Information submission.  | |
| 3. | To navigate to the next step, click "Next".  | |

1.5 Financial Assurance Information Step

1.5.1 Key Points

- Learn how to enter/modify information regarding the instrument.
- Learn how to view information related to the required Financial Assurance information.

1.5.2 Steps to complete the Financial Assurance Information step

| Step | Action | Required Fields |
|------|--|-----------------|
| 1. | <p>For the purpose of this example, select Yes for Override Amount Required?</p>  | |
| 2. | <p>The Total Financial Assurance Applied towards (W-3X Option C – Blanket Well), and Financial Assurance ID fields are all read-only.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. The Amount Required field value represents the dollar value required to be fulfilled by Instrument Value(s). For the purpose of this example, set the amount to be \$10,000 2. The Total Financial Assurance Applied towards (W-3X Option C – Blanket Well) field value represents the sum of all financial assurances associated to this organization that have the same Financial Assurance Purpose as the one selected in this form. 3. The Financial Assurance ID field value will be filled in by the system upon approval of the form as a unique id to help identify this particular financial assurance at a later time. | |

| | | |
|----|---|------------------------------------|
| | <p>Override Amount Required? * Amount Required * Total Financial Assurance Applied towards W-3X Option C - Blanket Well *</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No \$ 114945.00 \$ 10000.00</p> <p>Financial Assurance ID * Instrument Value * Bond Number *</p> <p>3180836 \$ 10000.00 B009159</p> <p>Date Received * Effective Date *</p> <p>12/2/2021 12/10/2021</p> <p>Expiration Date * Financial Assurance Status *</p> <p>6/1/2022 Approved</p> | |
| 3. | <p>Enter a the value of \$10,000 in the Instrument Value field.</p> <p>Instrument Value *</p> <p>\$ 10000.00</p> | Instrument Value |
| 4. | <p>Enter the applicable Bond Number in the Bond Number field.</p> <p>Bond Number *</p> <p>B009159</p> | Bond Number |
| 5. | <p>Complete the Date Received and Effective Date fields</p> <p>Date Received * Effective Date *</p> <p>12/2/2021 12/10/2021</p> <p>Note: The Effective Date determines the date the Financial Assurance will go into effect for the Organization.</p> | Date Received, Effective Date |
| 6. | <p>Set the Expiration Date to the indicated date the Financial Assurance expires.</p> <p>Expiration Date *</p> <p>6/1/2022</p> | Expiration Date |
| 7. | <p>Set the status of the Financial Assurance Status field to Approved.</p> <p>Financial Assurance Status *</p> <p>Approved</p> | Financial Assurance Status |
| 8. | <p>For the purpose of this example, select No for Does the Surety exist in LoneSTAR?</p> <p>Does the Surety exist in LoneSTAR? * ⓘ</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> | Does the Surety exist in LoneSTAR? |
| 9. | <p>Complete all address fields for the Surety and click the Validate button.</p> | Surety Name, Surety Address |

| | | |
|------------|--|---|
| | <p>Surety Name *</p> <input type="text" value="John Doe"/> <p>Surety Address Line 1 *</p> <input type="text" value="4315 South Dr"/> <p>Surety Address Line 2 Suite / Apt Suite / Apt #</p> <input type="text"/> <input type="text"/> <input type="text"/> <p>Surety Address City *</p> <input type="text" value="Houston"/> <p>Surety Address State * Surety Address Zip Code * Surety Address Country *</p> <input type="text" value="Texas"/> <input type="text" value="77053-4820"/> <input type="text" value="United States of America"/> <p><input type="button" value="Validate"/></p> | <p>Line 1, Surety Address City, Surety Address Country, Surety Address State, Surety Address Zip Code</p> |
| <p>9.</p> | <p>LoneSTAR will display a recommended address for you to select.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Validate Address ×</p> </div> <p>Entered Address</p> <p><input type="radio"/> 4315 South Dr, Houston, TX 77053-4820, United States of America</p> <hr/> <p>Suggested Address</p> <p><input checked="" type="radio"/> 4315 South Dr, Houston, TX 77053-4820, United States of America</p> <hr/> <p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="Select"/></p> | |
| <p>10.</p> | <p>To navigate to the next step, click "Next".</p> <p><input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Save"/></p> | |

1.6 Document Upload Step

1.6.1 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


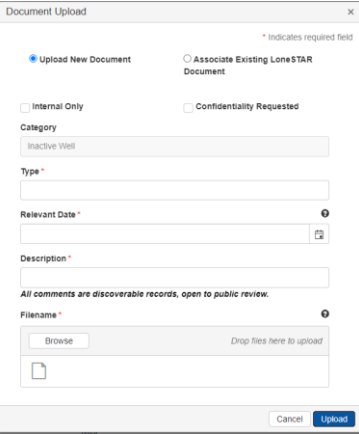
Advanced Filtering Actions Search

| Upload Date | Uploaded By | Description | Filename | Actions |
|-------------|-------------|-------------|----------|---------|
| | | | | |

No results to display

Back Next Save

1.6.2 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 Add New.</p>  | |
| 2. | <p>You will be presented with the Document Upload dialog.</p>  | |
| 3. | <p>The user can choose to upload a new document or associate an existing document.</p> | |

| | | |
|----|--|--|
| | <p> <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> | |
| 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>Filename * ?</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p style="text-align: center;"> <input type="button" value="Browse"/> Drop files here to upload </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>Filename * ?</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p style="text-align: center;"> <input type="button" value="Browse"/> ✓ Done </p> <div style="border: 1px solid #ccc; margin-top: 5px; padding: 5px;"> <p style="text-align: center;"> 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="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9; margin-top: 10px;"> <p style="text-align: center;"> <input type="button" value="Cancel"/> <input checked="" type="button" value="Upload"/> </p> </div> | |
| 9. | <p>If instead of uploading a new document, an existing document can be associated.</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9; margin-top: 10px;"> <p style="text-align: right; font-size: small;">* Indicates required field</p> <p> <input type="radio"/> Upload New Document <input checked="" type="radio"/> Associate Existing LoneSTAR Document </p> <p>Document ID *</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%; margin-top: 5px;"></div> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Cancel"/> <input checked="" type="button" value="Upload"/> </p> </div> | |

| | | |
|-----|---|--|
| 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 data-bbox="233 310 558 390" style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Cancel Upload </div> | |
| 11. | <p>To navigate to the next step, click “Next”.</p> <div data-bbox="233 443 570 510" style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Back Next Save </div> | |

1.6.3 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 |
|---------|---------------|-------|-------------|---------|
| | | | | |

Comments

20 items per page
 No results to display

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

Acknowledgement

Submitter

Submitter Title *

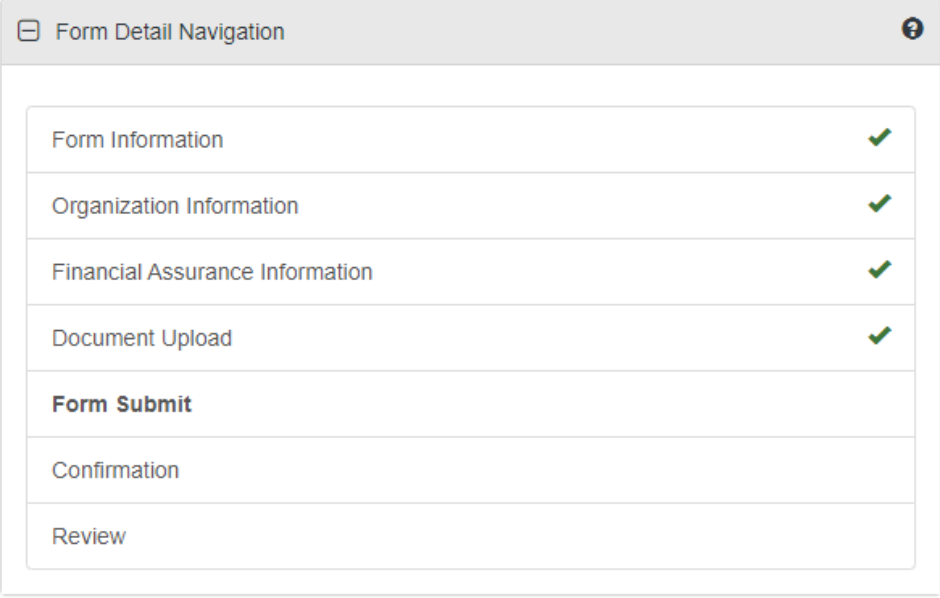
Date Received *

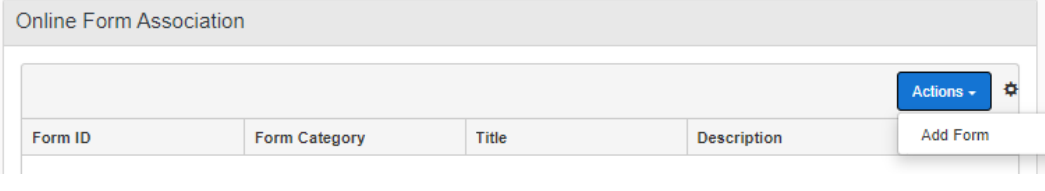
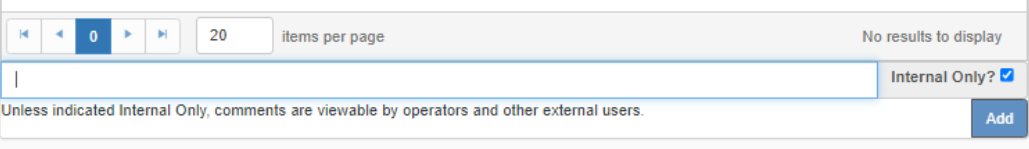
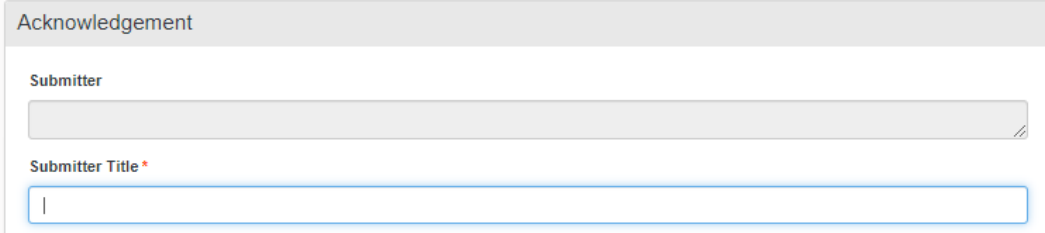
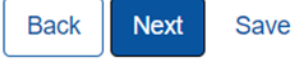
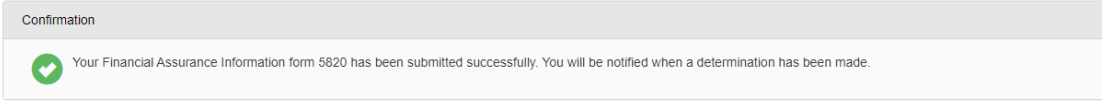
I hereby certify all statements made in this form are, to the best of my knowledge, true, correct, and complete. *

Form Submit Preview

Click the button below to preview your submission summary.

1.6.4 Steps to complete the Form Submit step

| Step | Action | Required Fields |
|------|--|-----------------|
| 1. | <p>While reviewing this form, you can select to jump to this step without navigating through the form by selecting the Submission step in the left-hand form navigation menu.</p>  | |
| 2. | <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> | |

| | | |
|----|---|--------------------------------|
| |  | |
| 3. | <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> | |
| 4. | <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 |
| 5. | <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 |
| 6. | <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> | |
| 7. | <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"> • Refreshing the page will display if the workflow processing has been completed. • Once the form has been submitted, External Users can no longer edit the form. | |


1.7 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. | In order to navigate to this step, click the “Review” step on the left-hand navigation of the form; steps will display below this selection showing the steps within this grouping. | |
| 2. | For the purpose of this guide, choose to Create Correspondence Create Correspondence? <input checked="" type="radio"/> Yes <input type="radio"/> No | Create Correspondence |
| 3. | Choose not to Send via Certified Mail. <input type="checkbox"/> Send via Certified Mail? | |
| 4. | Select the Correspondence Type dropdown to be General. Correspondence Type General | |
| 5. | Complete the Subject line to be “Financial Assurance Correspondence” Subject * Financial Assurance Correspondence | Subject |
| 6. | Complete the Signatory Name field as your preferred name. | Signatory Name |

| | | |
|-----|---|----------------------|
| | <p>Signatory Name *</p> <input type="text" value="John Doe"/> | |
| 7. | <p>For the purpose of this example, do not select to CC any additional organizations.</p> <p>CC Organizations</p> <input type="text"/> | |
| 8. | <p>From the Signatory Department dropdown, select “P-5 Financial Assurance Unit”.</p> <p>Signatory Department *</p> <input type="text" value="P-5 Financial Assurance Unit"/> | Signatory Department |
| 9. | <p>For the purpose of this example, do not select to CC any additional people.</p> <p>CC People</p> <input type="text"/> | |
| 10. | <p>Enter a description to be able to identify this document at a later time.</p> <p>Description * </p> <input type="text"/> <p>Note: This description is not the title of the correspondence, this is meant to be an easily identifiable description that can be used to locate the correspondence at a later time.</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><small>Correspondence Text *</small></p> <input type="text"/> | 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: If this is not selected, the correspondence will not be sent.</p> | |
| 13. | <p>Select the save and then the Preview link, this will download a PDF copy of what the correspondence will look like when sent.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Preview</p> </div> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 20px;"> <input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Save"/> </div> | |

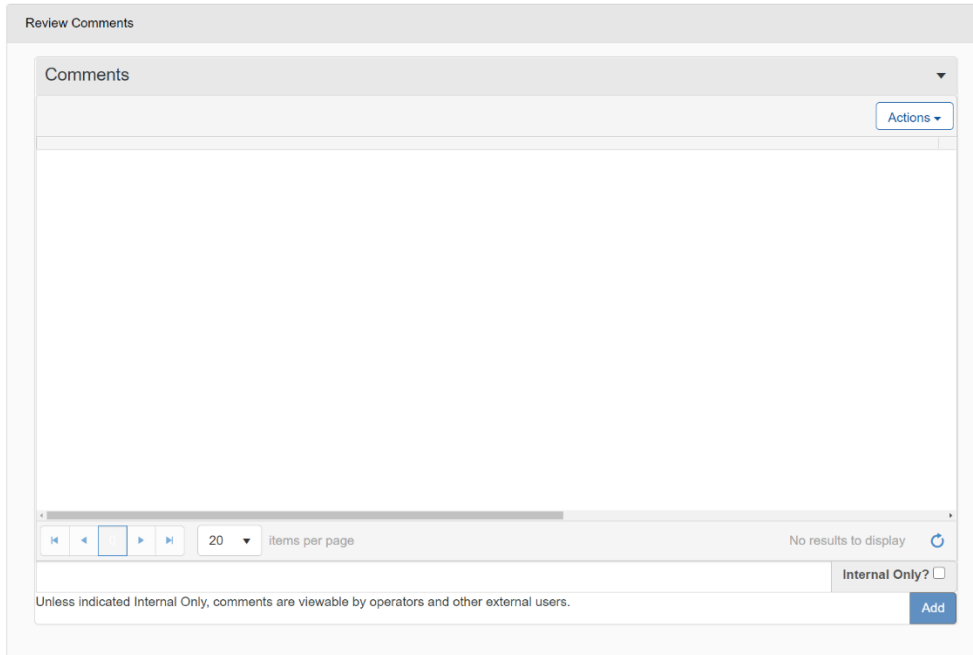
| | | |
|-----|---|--|
| 14. | To navigate to the next step, click “Next”. | |
|-----|---|--|



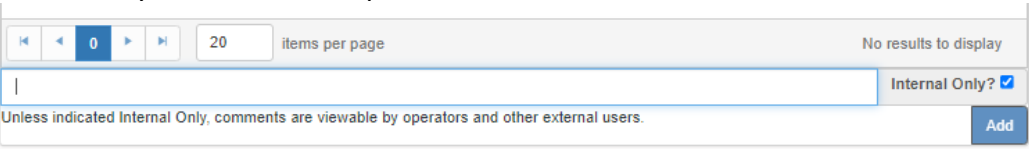
1.8 Review Comments Step

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. | |

| | | |
|----|---|--|
| | <div style="border: 1px solid gray; padding: 5px; display: inline-block;">Internal Only? <input type="checkbox"/></div> | |
| 3. | <p>Select the Next button to proceed to the next step.</p> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid gray; padding: 2px 10px; border-radius: 4px;">Back</div> <div style="background-color: #0056b3; color: white; padding: 2px 10px; border-radius: 4px;">Next</div> Save </div> | |

1.9 Review Step

1.9.1 Key Points

- Learn how to complete the Review Step.

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**
- Create Correspondence ✓
- Review Comments ✓
- Review

Review

| Task Name | Workgroup | Assigned To | Created | Last Updated | Review Status | Actions |
|--|---------------|-------------|---------------------|---------------------|---------------|--------------------------|
| Financial Assurance Review | P-5 Workgroup | | 12/10/2021 10:10 AM | 12/10/2021 10:10 AM | | Actions+ |

Viewing 1 - 1 from 1 results

Back Close

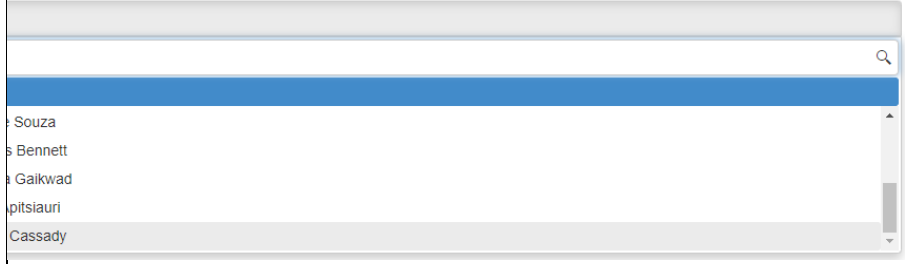
1.9.2 Steps to complete the Review step

| Step | Action | Required Field | | | | | | | | | | | | | | |
|--|---|-----------------------|---------------------|---------------------|---------------|--------------------------|---------------|---------|--|---------------|--|---------------------|---------------------|--|--------------------------|--|
| 1. | <p>The step is pre-populated with a review task to be completed.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <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 Review</td> <td>P-5 Workgroup</td> <td></td> <td>12/10/2021 10:10 AM</td> <td>12/10/2021 10:10 AM</td> <td></td> <td>Actions+</td> </tr> </tbody> </table> | Task Name | Workgroup | Assigned To | Created | Last Updated | Review Status | Actions | Financial Assurance Review | P-5 Workgroup | | 12/10/2021 10:10 AM | 12/10/2021 10:10 AM | | Actions+ | |
| Task Name | Workgroup | Assigned To | Created | Last Updated | Review Status | Actions | | | | | | | | | | |
| Financial Assurance Review | P-5 Workgroup | | 12/10/2021 10:10 AM | 12/10/2021 10:10 AM | | 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; margin-top: 10px;"> <p>Task Name</p> <p>Financial Assurance Review</p> </div> | | | | | | | | | | | | | | | |
| 3. | <p>assign the task to yourself, select the Edit button at the bottom</p> | Assigned To, Due Date | | | | | | | | | | | | | | |

se **Edit**

the "Assigned To" dropdown, select your name from the list

Assigned To



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

Due Date *

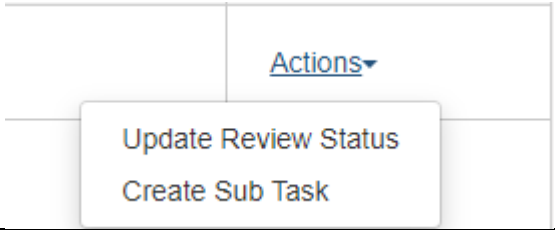
Select Save (you will be taken back to the Review Step of the Form)

Cancel **Save**

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

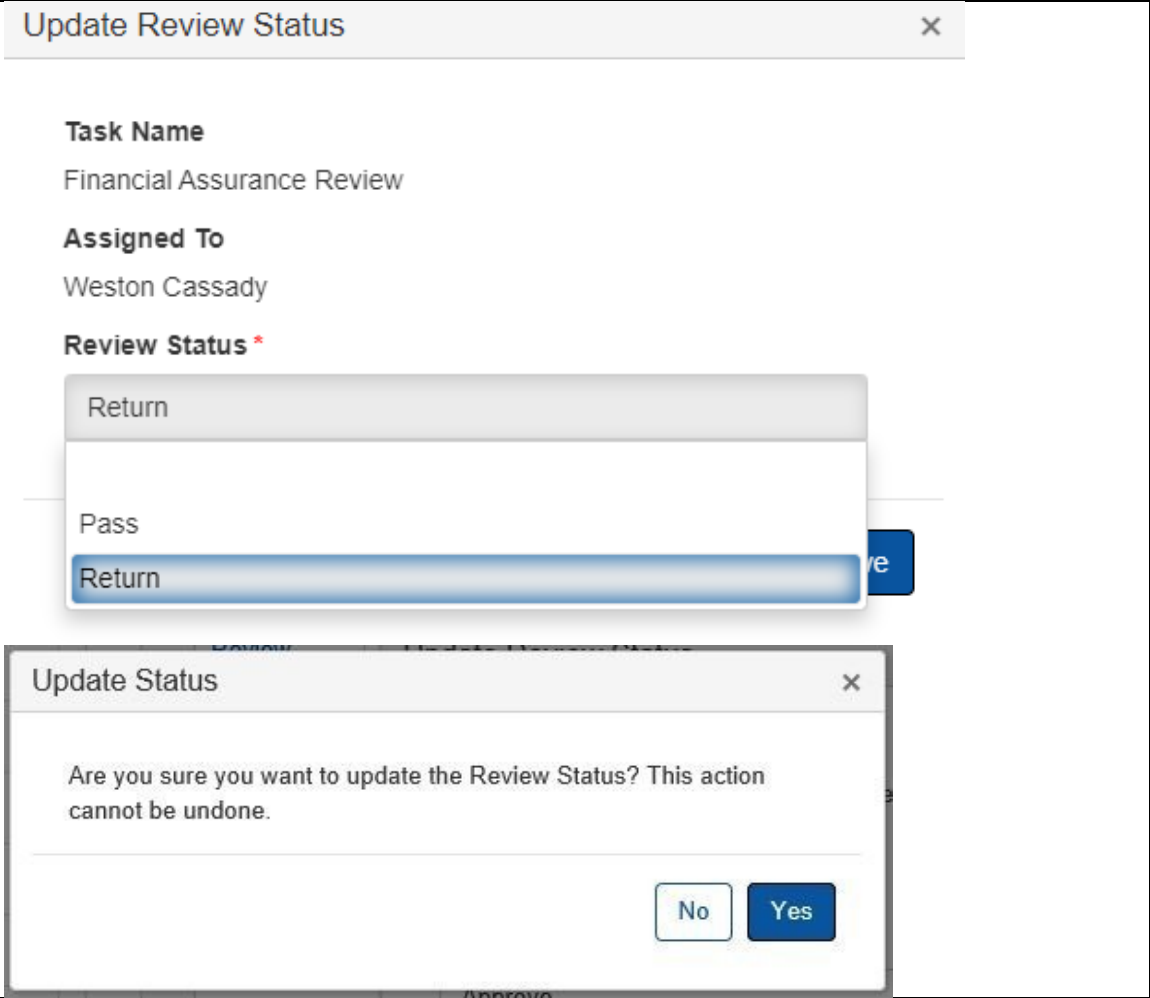
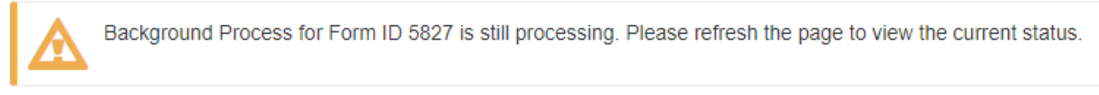
| Task Name | Workgroup | Assigned To | Created | Last Updated | Review Status | Actions |
|----------------------------|---------------|----------------|---------------------|---------------------|---------------|----------|
| Financial Assurance Review | P-5 Workgroup | Weston Cassidy | 12/10/2021 10:55 AM | 12/10/2021 11:02 AM | | Actions▼ |

5. For the purpose of this guide, we are going to choose to Return the form first. To do so, select Update Review Status from the dropdown.



6. Select Return from the Review Status dropdown and select Save to disposition the task. You will be asked to confirm your selection and select to continue. Continue this process for all subsequent review tasks.

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, re-submit the form from the Form Submit step.</p> | |
| 9. | <p>For the purpose of this guide, we are now going to choose to Deny this form. To do so, select Update Review Status from the dropdown and complete the previous steps again selecting Deny from the dropdown.</p> | |