



User Reference Guide

Bond Management

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BOND MANAGEMENT

Course Description

The bond management course describes the process used for creating and maintaining bond information in the WellSTAR system.

Process Flow

The end-to-end process for **Bond Management** covers the following:

- **Create and Maintain Bonds**
- **Release Bond**
- **Generate Bond Release Correspondence to Operator**
- **Monitor Bond Data**

1 CREATE AND MAINTAIN BONDS

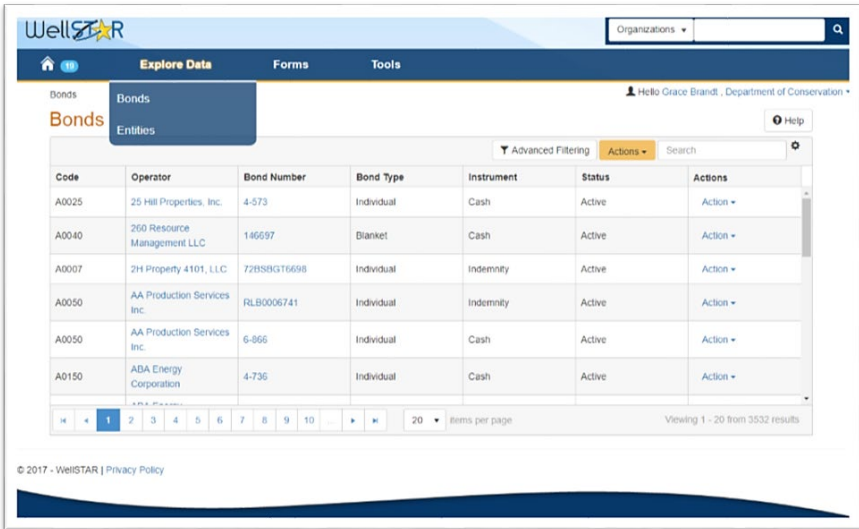
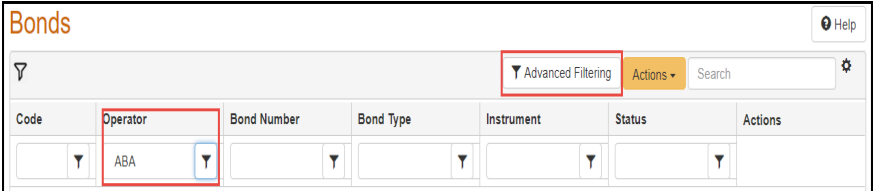
The screenshot displays the WellSTAR Bonds management interface. The header includes the WellSTAR logo and navigation tabs: Home, Explore Data, Forms, and Tools. The user is logged in as Joseph Athanasious, Department of Conservation. The main content area is titled 'Bonds' and features a table with columns: Code, Operator, Bond Number, Bond Type, Instrument, Status, and Actions. The table lists six bond records. Below the table is a pagination control showing '1' of 10 pages, with a '20' items per page dropdown and a status 'Viewing 1 - 20 from 3552 results'. A copyright notice '© 2017 - WellSTAR' is at the bottom left.

Code	Operator	Bond Number	Bond Type	Instrument	Status	Actions
A0045	1552 Rockwood Street Charter Facilities, LLC	1-244	Individual	Cash	Active	Action ▾
A0025	25 Hill Properties, Inc.	4-573	Individual	Cash	Active	Action ▾
A0040	260 Resource Management LLC	146697	Blanket	Cash	Active	Action ▾
A0007	2H Property 4101, LLC	72BSBG76698	Individual	Indemnity	Active	Action ▾
A0050	AA Production Services, Inc.	RLB0006741	Individual	Indemnity	Active	Action ▾
A0050	AA Production Services, Inc.	6-866	Individual	Cash	Active	Action ▾

1.1 Search for Operator

Key Points

Always search via Advanced Filtering to verify no duplicate or similar entries exist.

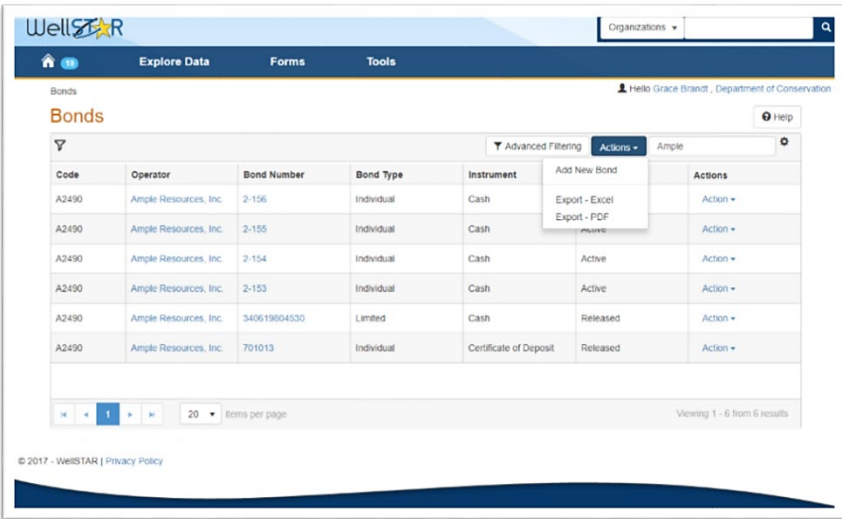
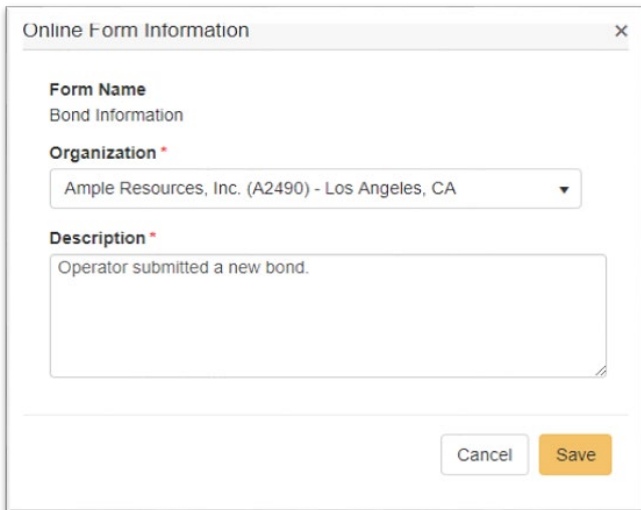
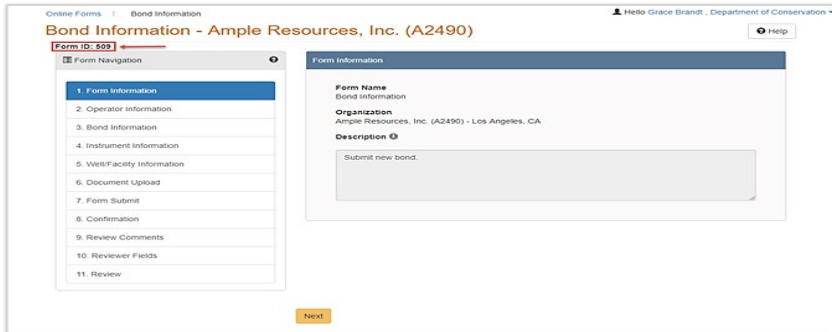
Step	Action	Required Fields
1.	<p>Select Explore Data then select Bonds from</p>  <p>drop down menu.</p>	
2.	Select Advance Filtering.	
3.	 <p>Select a field to search (Example: Operator).</p>	
4.	Select filter parameters.	

1.2 Create a Bond

Key Points

- Triggered by new bond submission by Operator
- HQ user will approve or deny
- Operator will be notified through correspondence

Bond Management

Step	Action	Required Fields
1.	<p>Click Actions drop down menu and select Add New Bond.</p> 	
2.	<p>Verify operator name is correct.</p>  <p>Fill in Organization information and "Description". Click Save.</p>	Organization Description
3.	<p>WellSTAR will assign a Form ID and opens the Form Navigation.</p>  <p>Click Next.</p>	

4. Review Organization Information

Online Forms | Bond Information Hello Grace Brandt - Department of Conservation

Bond Information - Ample Resources, Inc. (A2490) Help

Form ID: 511

Form Navigation

1. Form Information
2. Operator Information
3. Bond Information
4. Instrument Information
5. Well/Facility Information
6. Document Upload
7. Form Submit
8. Confirmation
9. Review Comments
10. Reviewer Fields
11. Review

Operator Information

Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the Organization's Agent and the form submitter are selected as contacts.

Organization Name
Ample Resources, Inc.

Type of Organization
Unknown

Organization Primary Address
1901 Avenue of the Stars, Suite 200
Los Angeles, CA 90067

Organization Primary Phone Number
Ext

Form Contacts

Name	Phone Number	Email	Role	Actions
Grace Brandt		Grace.Brandt@conservation.ca.gov	Submitter	
			Agent	

Click Next.

5. Fill in the bond information:

- Select the Bond Type: cash, passbook, indemnity, or certificate of deposit
- Select the Bond Coverage: Offshore, Onshore
- Select Bond Purposes: Commercial Class II, Idle Well, Life of Facility, Life of Well, Well Depth < 10000, Well Depth > 10000

Bond Type
Bond Coverage
Bond Purpose

Online Forms | Bond Information Hello Grace Brandt - Department of Conservation

Bond Information - Ample Resources, Inc. (A2490) Help

Form ID: 511

Form Navigation

1. Form Information
2. Operator Information
3. Bond Information
4. Instrument Information
5. Well/Facility Information
6. Document Upload
7. Form Submit
8. Confirmation
9. Review Comments
10. Reviewer Fields
11. Review

Bond Information

Select bond information.

Bond Type *

Bond Coverage *

Bond Purpose *

* Indicates required field

Blanket
Individual
Limited

Offshore
Onshore

Commercial Class II
Idle Well
Life of Facility
Life of Well
Well Depth < 10000
Well Depth > 10000

Back Next Save

Click Next.

NOTE: Users can Save the form using the save button complete and submit the form at a later time. The form can be retrieved from Forms in Progress tab.

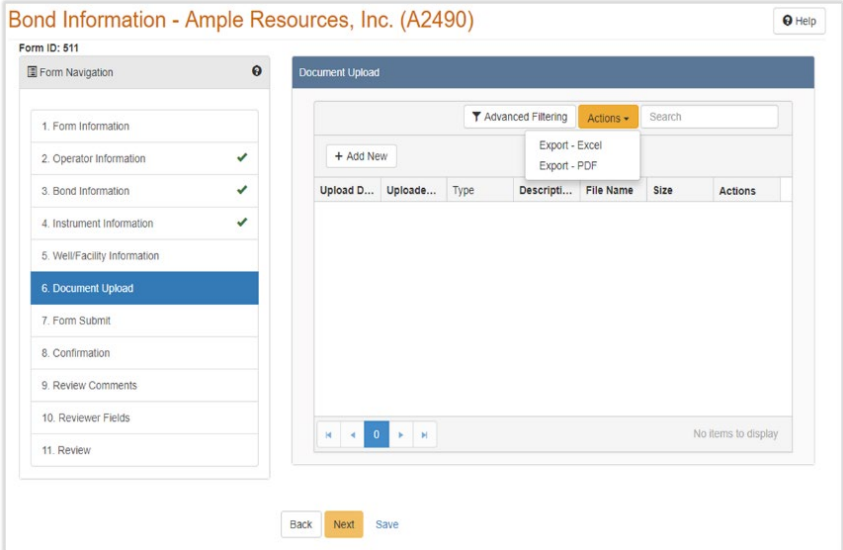
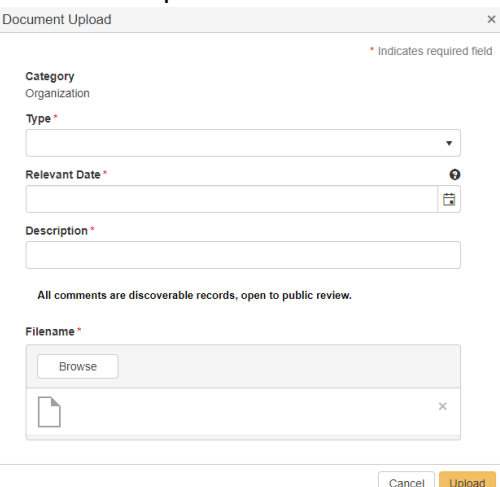
6. Click on Add Instrument:
Fill in the instrument Information: Enter Bond value, instrument number and Description.

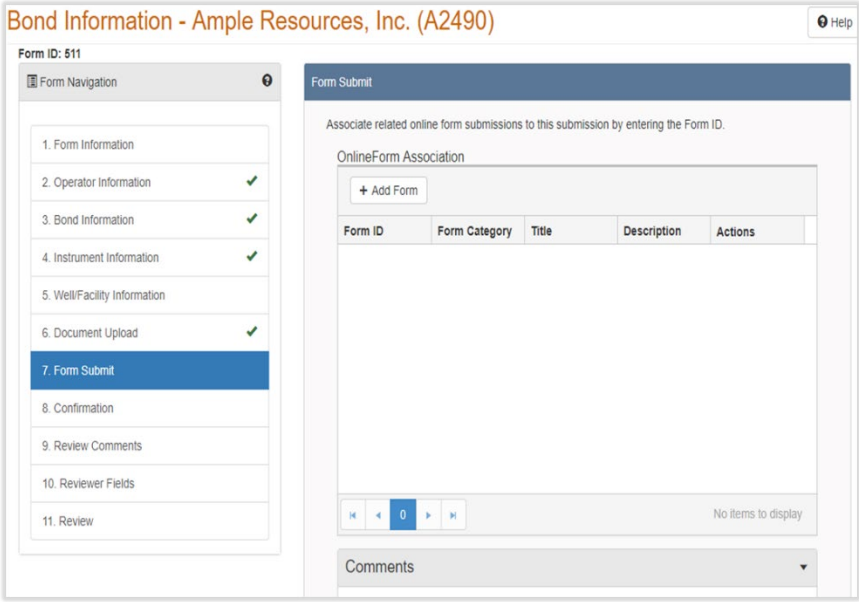
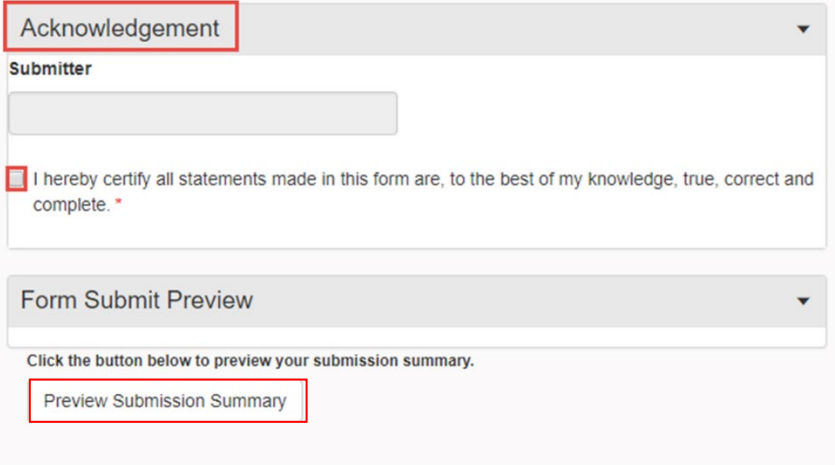
Instrument Type
Value
Instrument No.
Description

Click Next.

7. In the “Select Wells Grid” click the well and use down arrows to move the well to associated wells.
Click the box next to API to select all the wells on the page and use down arrows to move all the associated wells. (Note: This will only select the 20 wells on the current page. Additional wells will have to be selected on the subsequent pages).

In the “Select Facilities Grid” select the facility and use down arrows between the two lists.
Click Next.

8.	<p>Upload pertinent documents such as:</p> <ul style="list-style-type: none"> • Power of attorney • Bond Form • Bond rider • Notarized signature 	
9.	Use the Actions drop down to select Add New.	
10.	<p>Enter the required information.</p> 	
11.	<p>Navigate to the file to be uploaded.</p> <p>Note: When filing on behalf of the Organization, the original documentation submitted by the Organization via paper mail, email, or other method should be uploaded during this step.</p>	
12.	Select Upload.	
13.	Select Save.	
14.	Select Next.	

15.	<p>On the Form Submit tab, add other Form ID associated with the bond.</p> 	
16.	<p>To associate a form that already exists in the WellSTAR system to this form: Select + Add Form button.</p>	
17.	<p>Select the form to be associated.</p>	
18.	<p>Select Save.</p>	
19.	<p>Click on Preview Submission Summary to review before submittal.</p>  <p>Click on the acknowledgement box for certification. Click "Next".</p>	

Bond Management

20. Confirmation Tab – WellSTAR will confirm that Bond Form has been successfully submitted. Click Close.

1.3 Modify a Bond

Key Points

- Occurs when:
 - Operator name change
 - Change in well designation on individual Bond
 - Increase monetary liability associated with bond
 - Replacement bond or other type of rider

Step	Action	Required Fields
1.	Select “Explore data” and then select “Bonds”.	
2.	Search for bond using bond number.	

Bond Management

3. Click bond number to open “Bond Details” and click Edit Details.

Bond Detail
White Knight Production LLC — Bond Number RLB0016064

Organization Name: White Knight Production LLC
Organization Code: W2050
Bond Type: Blanket
Bond Purpose: Onshore
Bond Coverage: Onshore
Max # of Wells: 10
Bond Number: RLB0016064
Bond Instrument: Indemnity
Bond Status: Active
Bond Value: \$400,000.00

Associated Wells

API	Lease Name	Well Designation	Well Type	Status	Field
0401924496	Surfuh	Surfuh 512	Oil & Gas	Active	Raisin City
0401924529	Surfuh	Surfuh 546	MultiPurpose	Active	Raisin City
0401924530	Surfuh	Surfuh 525	Oil & Gas	Active	Raisin City
0401924531	Rippendan	Rippendan 515	MultiPurpose	Active	Raisin City
0401924623	Rippendan	Rippendan 509-13	MultiPurpose	Active	Raisin City
0401924624	McKean	McKean 15-1	Oil & Gas	Active	Helm
0401924602	Vanderham	Vanderham 651-B	Oil & Gas	Active	Helm
0401924642	McKean	McKean 673-15	Oil & Gas	Active	Helm
0401924644	Bains	Bains 674-9	Oil & Gas	Active	Helm

Associated Facilities

4. Enter reason for change in Description and click Save.

Online Form Information

Form Name
Bond Information

Organization
AA Production Services Inc.

Description *

Increase bond amount.

Cancel Save

Description

5. WellSTAR will assign a Form ID number and click Next.

Online Forms | Bond Information

Hello Joseph Athanasious, Department of Conservation

Bond Information - Egyptian Oil Co. (10746)

Form ID: 1249

Form Navigation

1. Form Information
2. Operator Information
3. Bond Information
4. Instrument Information
5. Well/Facility Information
6. Document Upload
7. Form Submit
8. Confirmation
9. Review Comments
10. Reviewer Fields
11. Review

Form Information

Form Name
Bond Information

Organization
Egyptian Oil Co.

Description

Increase Bond Amount

All comments are discoverable records, open to public review.

Next

Bond Management

6. Review the Operator Information. Click Action to Add additional contact person and click Next.

Bond Information - E & T Limited Liability Co. (E1700) Help

Form ID: 615

Form Navigation

1. Form Information
2. Operator Information
3. Bond Information
4. Instrument Information
5. Well/Facility Information
6. Document Upload
7. Form Submit
8. Confirmation
9. Review Comments
10. Reviewer Fields
11. Review

Operator Information

Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the Organization's Agent and the form submitter are selected as contacts.

Organization Name
E & T Limited Liability Co.

Type of Organization
LLC

Organization Primary Address
21520 - G Yorba Linda Boulevard, #554
Yorba Linda, CA 92887

Organization Primary Phone Number
Ext

Form Contacts

Name	Phone Number	Email	Role	Actions
Grace Brandt		Grace.Brandt@conservation.ca.gov	Submitter	
			Agent	

Bond Management

7. Modify Bond Information if required and click Next.

Bond Information - Anacapa Oil Corporation (A2500) [Help](#)

Form ID: 666

Form Navigation

1. Form Information
2. Operator Information ✓
- 3. Bond Information**
4. Instrument Information
5. Well/Facility Information
6. Document Upload
7. Form Submit
8. Confirmation
9. Review Comments
10. Reviewer Fields
11. Review

Bond Information

Select bond information. * Indicates required field

Bond Type *
Blanket

Bond Coverage *
Onshore

Bond Purpose *
Well Count 20-50

[Back](#) [Next](#) [Save](#)

8. Modify Instrument Information if required and click Next.

Bond Information - E & T Limited Liability Co. (E1700) [Help](#)

Form ID: 939

Form Navigation

1. Form Information
2. Operator Information ✓
3. Bond Information ✓
- 4. Instrument Information**
5. Well/Facility Information
6. Document Upload
7. Form Submit
8. Confirmation
9. Review Comments
10. Reviewer Fields
11. Review

Instrument Information

Select instrument information. * Indicates required field

Bond Value **Instrument Total** **Bond Effective Date**
\$0.00 \$25,000.00 2/27/2018 [📅](#)

Select	Financial Instrument	Value	Instrument Number	Financial Institution	Description
<input type="radio"/>	Cash	\$20,000.00	0		
<input type="radio"/>	Cash	\$5,000.00	C-896		Add rider

[Add Instrument](#) [▼](#)

[Back](#) [Next](#) [Save](#)

Bond Management

9. Add Wells or Facility to Associated Bond and click Next.

Bond Information - E & T Limited Liability Co. (E1700) [Help](#)

Form ID: 939

Form Navigation

- 1. Form Information
- 2. Operator Information ☒
- 3. Bond Information ☒
- 4. Instrument Information ☒
- 5. Well/Facility Information**
- 6. Document Upload
- 7. Form Submit
- 8. Confirmation
- 9. Review Comments
- 10. Reviewer Fields
- 11. Review

Well/Facility Information

Select associated Wells and/or Facilities * Indicates required field

Select Wells Grid

	API	Operator...	Well Desi...	Well Type	Well Status	Field
<input type="checkbox"/>	0403721844	E & T Limited Liability Co.	Nance Blinn 1	Oil & Gas	Active	Wilmington
<input type="checkbox"/>	0403723087	E & T Limited Liability Co.	? E-T 16	Oil & Gas	Idle	Seal Beach
<input type="checkbox"/>	0403723085	E & T Limited Liability Co.	? E-T 14	Oil & Gas	Idle	Seal Beach
<input type="checkbox"/>	0403722102	E & T Limited Liability Co.	WTU 1857	Oil & Gas	Plugged & Abandoned	Wilmington

Items per page: 20 Viewing 1 - 8 from 8 results

Associated Wells

	API	Operator...	Well Desi...	Well Type	Well Status	Field
<input type="checkbox"/>	0403723085	E & T Limited Liability Co.	? E-T 14	Oil & Gas	Idle	Seal Beach

10. Upload supporting document and click Next.

Bond Information - Anacapa Oil Corporation (A2500) [Help](#)

Form ID: 888

Form Navigation

- 1. Form Information
- 2. Operator Information ☒
- 3. Bond Information ☒
- 4. Instrument Information ☒
- 5. Well/Facility Information ☒
- 6. Document Upload**
- 7. Form Submit
- 8. Confirmation
- 9. Review Comments
- 10. Reviewer Fields
- 11. Review

Document Upload

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

Upload D...	Uploads...	Type	Description	Filename	Size	Actions
-------------	------------	------	-------------	----------	------	---------

[Back](#) [Next](#) [Save](#)

Bond Management

11. Click on Preview Submission Summary to review, click Acknowledgement box, and click Submit.

Check box

Acknowledgement

Submitter

☐ 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](#)

Form Information [Edit](#)

Form Name
Bond Information

Organization
Anacapa Oil Corporation

Description ⓘ

All comments are discoverable records, open to public review.

Operator Information [Edit](#)

Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the Organization's Agent and the form submitter are selected as contacts. * Indicates required field

Organization Name
Anacapa Oil Corporation (A2500)

Type of Organization
Corporation

Organization Primary Address
5403 Franklin Rd.
Yuba City, CA 95992

Organization Primary Phone Number **Ext**

Contacts

Name	Phone Number	Email	Role
Grace Brandt		Grace.Brandt@conservation.ca.gov	Submitter
			Agent

Bond Information [Edit](#)

Bond Type
Individual

Bond Coverage
Onshore

Bond Number
701026

Bond Purpose
Well Depth < 10000

Instrument Information [Edit](#)

Bond Value	Instrument Total	Bond Effective Date	Maximum # of Wells
\$25,000.00	\$25,000.00		1

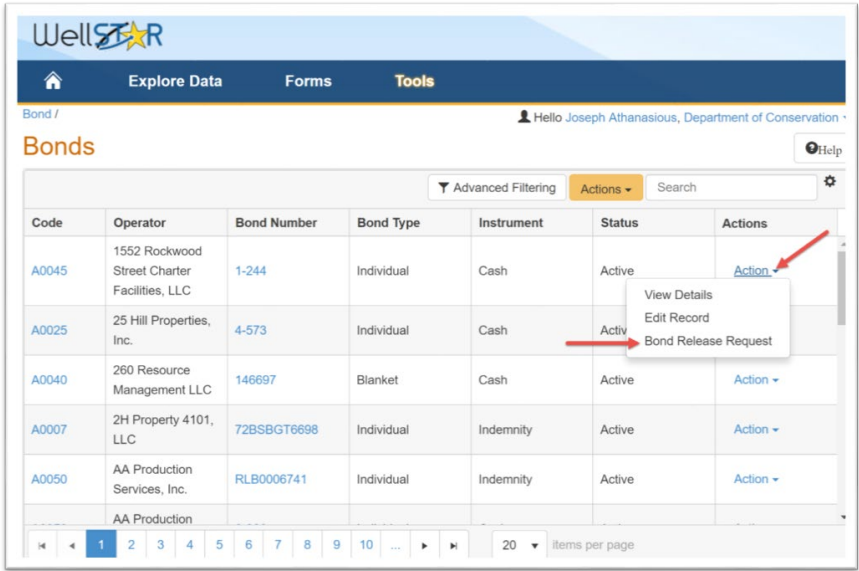
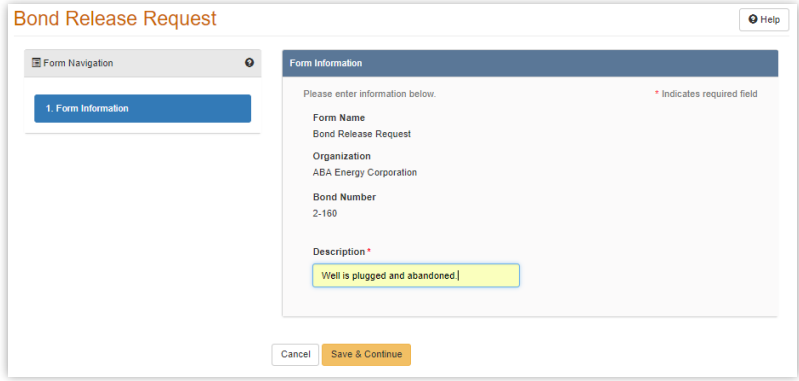
1.4 Release Bond

Key Points

- Initiated by Operator or Agency user submission of "Bond Release Request" form

Bond Management

- Reviewed by District Bond Coordinator and then finalized by HQ Bond Administrator
- A bond release is requested when:
 - A field or well has been abandoned
 - An operator has sold the asset and no longer is liable for bonding

Step	Action	Required Fields
1.	Select "Explore data" and then select "Bonds".	
2.	Search for bond using operator name or bond number.	
3.	Click bond number to open, Click Actions, click Bond Detail, and click Bond Release Request.	
		
4.	Enter a short description and Click Save & Continue.	Description
		
5.	District review Form Navigation Section 1 to 3, upload document and submit Bond Release Request form.	

Bond Management

Bond Release Request - ABA Energy Corporation (A0150)

Form ID: 688

Form Navigation

- 1. Form Information
- 2. Operator Information
- 3. Bond Information
- 4. Document Upload
- 5. Form Submit
- 6. Confirmation
- 7. District Review
- 8. DOGGR HQ Review
- 9. Bond Release Correspondence
- 10. Review Comments
- 11. Review

Bond Information

Confirm information below for bond release. * Indicates required field

Bond Number: 2-160

Bond Instrument: Cash

Bond Effective Date: 7/11/2016

Amount: 25000

Bond Type: Individual

Bond Coverage: Onshore


Bond Purpose: Onshore

2 GENERATE “RELEASE BOND CORRESPONDENCE” TO OPERATORS

2.1 Generate “Bond Release Correspondence”

Key Points

- Generated by WellSTAR during “Release a Bond” workflow after Operator or Agency user submits a “Bond Release Request”.

Step	Action	Required Fields
1.	Agency user completes “Bond Release Request”.	
2.	Enter fillable fields with pertinent data to correspondence.	
3.	Once the HQ Bond Release Correspondence review task is completed, WellSTAR will generate an Oil and Gas Supervisor Final Review task. 	
4.	WellSTAR will email the correspondence to the operator. If the operator has selected to receive correspondences through standard mail, a task is created indicating the PDF document must be printed and mailed.	

3 MONITOR BOND DATA

3.1 Monitor Bond Data

Bond Management

Bonds						
<div> <div>Advanced Filtering</div> <div>Actions ▾</div> <div>aba</div> <div>Help</div> </div>						
Code	Operator	Bond Number	Bond Type	Instrument		Actions
A0150	ABA Energy Corporation	6-884	Individual	Cash		Action ▾
A0150	ABA Energy Corporation	2-149	Individual	Cash	Active	Action ▾

Step	Action	Required Fields
1.	Navigate to Bond management page and view a summary of Bond Data and Statuses.	
3.	Click “Actions” button.	
4.	Select Export to Excel.	

Code ▾	Operator ▾	Bond Number ▾	Bond Type ▾	Instrument ▾	Status
A2500	Anacapa Oil Corporation	701024	Blanket	Indemnity	Active
A2500	Anacapa Oil Corporation	701025	Blanket	Cash	Active
A2500	Anacapa Oil Corporation	701026	Individual		Active
A2500	Anacapa Oil Corporation	053000017524	Limited	Cash	Active
A2500	Anacapa Oil Corporation	6-696	Individual	Indemnity	Released
A2500	Anacapa Oil Corporation	2327	Limited	Cash	Released