



Transfer Management Quick Reference Guide

- **Submit Transfer**
- **Monitor Transfer**

Background Information

- A Transfer may be initiated by either Operator (the Acquiring or Transferring Operator), but both Operators must acknowledge the form is complete and accurate before it is submitted to the Department for review.
- You can Transfer all assets associated to a lease, or to select specific wells and/or facilities to be Transferred.
- You can also select a bond to associate to the Transferred assets, as applicable.
- Audit Trail and History of database interactions are recorded and stored in the Events section of an Organization's summary page.

Create/Submit Transfer

1. From Explore Data, select Transfers. Clicking the Action button, select the option to create a new Transfer.
2. Transfer Asset Form displays, information from hard copy is entered.
3. If you need to Transfer all assets associated to a lease, then;
 - a. Filter the lists of Wells and Facilities by the associated lease.
 - b. Select all assets associated to the lease and assign them to be part of the Transfer.
4. To Transfer wells or facilities:
 - a. Search and select the wells or facilities to be transferred and WellSTAR populates the form with the selected items.
 - b. You have the option to select a bond to associate with the wells to be transferred by selecting Action after moving wells to the lower grid of the form.
5. Upload documents associated to the Transfer.
6. After submitting the form, WellSTAR performs a form validation. If successful, WellSTAR creates tasks for Internal Users to **Review** the Transfer.

NOTE: If the form validation is unsuccessful, WellSTAR displays a message to the User to modify the submission and resubmit.

Monitor Transfer

The Monitor Transfer process is used when Internal Users in WellSTAR want to filter and/or export reports.

1. From Explore Data, select Transfer.
2. In search box, enter criteria desired (Advanced filtering is available).
3. Click the Actions button.
4. Select to export in Excel or PDF format.

ID	T. O. Code	Transferring Organization	A. O. Code	Acquiring Organization	Transfer Assets	Termination Date	Status
3	C5850	Cities Service Oil And Gas Co.	C7720	Continental Trading Internat		2/2017	Pending
4	C5850	Cities Service Oil And Gas Co.	C5400	Chase Production Co.		12/01/2017	Pending
5	S7425	Sunset Exploration, Inc.	C5400	Chase Production Co.		12/07/2017	Pending
6	C5400	Chase Production Co.	C5850	Cities Service Oil And Gas Co.		12/13/2017	Pending
7	C5400	Chase Production Co.	C5850	Cities Service Oil And Gas Co.		12/13/2017	Pending
8	C7720	Continental Trading Internat	C8200	Cooper & Brain - Brea		12/14/2017	Pending
9	C8200	Cooper & Brain - Brea	C9700	Coyote Oil Company, Ltd.		12/14/2017	Pending

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