

# **User Reference Guide**

## **Transfer Management**

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#### TRANSFER MANAGEMENT

#### **Course Description**

The Transfer Management course describes the process of creating and maintaining transfer information in the WellSTAR system. It details the process where External Users submit the Transfer Assets form to create and submit a well or facility transfer in WellSTAR.

#### **Process Flow**

The process for Transfer Management covers the following:



#### TRANSFER MANAGEMENT

• 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 Division for review.

#### Lesson Objectives:

- Create/Submit Transfer
- Monitor Transfer

#### **1.0** Submit Transfer

#### 1.1 Key Points

- Wells and Facilities are transferrable on one form
- Upon submittal of form, WellSTAR will create tasks for Bond and District Workgroups to review Transfer

Well						
<b>î</b> 🗿	Explore Data	1	Forms			
Home	Bonds					
Home	Entities					
MyTasks	Facilities Aler	rts On	ine Forms			
$\nabla$	Production					
Task Name	Tests	Organizat	ion			
Review Org	a Transactions ion		eek Ltd.			
Review Org	UIC Projects Wells		roleum Corpon			

#### **1.2 Steps to Create/Submit a Transfer**

Step	Action	Required Fields
1.	From the home page hover over Explore Data.	
2.	Select Transfers	

Trai	nsfers							🛛 Help
				▼ Advanced	d Filtering	Actions -	Search	\$
ID +	T. O. Code	Transferring Organization	A. O. Code	Acquiring Organization	Transfer	Assets	etermination Date +	Status
1	S0325	Sacgasco, LLC	N1223	Andrew L. Newkirk	Export - I	Excel	/15/2017	Pending
3	S0576	Salt Creek Oil LLC	N1223	Andrew L. Newkirk	Export - I	PDF	/21/2017	Pending

Transfer Assets		G Help
Form Navigation  I. Form Information	Form Information     Please enter information below.     Form Name	* Indicates required field
	Transfer Assets Description * All comments are discoverable records, open to public review. Transferring Organization *	
	Please Select   Acquiring Organization *  Please Select	
	This is a one-way transfer Cancel Save & Continue	

Step	Action	Required Fields
1.	Click the Action button and Select 'Transfer Assets'	
2.	Section 1: Enter a Description of the Transfer	Description
3.	Enter the Organizations: Select the Transferring Organization and the Acquiring Organization	Transferring Organization Acquiring Organization
4.	If this is a one-way transfer, select the box indicating this (displayed for Internal Users only). Note: WellSTAR is able to capture well abandonment permits/well ownership for land developers. This relates to one-way Transfers where the land 'Developers' become the 'Operator'.	
5.	Select Save & Continue	

The Form Navigation	Transferring Organizatio	n					
1. Form Information	Please confirm the correct Organization has been selected, and "Indicates required field designate contact(s) with their correct role. By default, the Organization's Agent and the form submitter are selected as contacts.						
2. Transferring Organization     3. Acquiring Organization	Organization Name Anacapa Oil Corpora	tion (A2500)	<b>Type o</b> Corpor	f Organization ation		Add Contact  Indicates required field	×
4. Transfer Details 5. Well EDD	Organization Prima 5403 Franklin Rd. Yuba City, CA 95992 Organization Prima	ry Address	Ext				
6. Well Association 7. Facility EDD	Contacts				Find Person *		
8. Facility Association 9. Document Upload	Name	Phone Number	Email	Role	Actions		
10. Form Submit	Sharon Armstrong	(916) 323-0427	sharon.armstrong @conservation.ca .govx	Submitter		Phone Number	
11. Confirmation       12. Review Comments				Agent		Email	
13. Review						Cancel Sav	e

Form Navigation	Transfer Details			
1. Form Information	Transferring Organization Anacapa Oil Corporation			
2. Transferring Organization     3. Acquiring Organization	Acquiring Organization Andrew L. Newkirk			
4. Transfer Details	Date Of Acquisition *			
5. Well EDD	02/21/2018			
6. Well Association	Date Of Operation *			
7. Facility EDD	DOGGR recommends the effective date of operations transfer occur on the 1st of the month. Operators must report Production and Injection volumes in full-month increments. If the effective date of operations is not on			
8. Facility Association	the 1st of the month, the Transferring Operator will be responsible for reporting production and injection volumes for the entire month, with the Acquiring Operator's reporting responsibility beginning the 1st of the next month.			
9. Document Upload	02/21/2018			
10. Form Submit	Type Of Transfer*			
11. Confirmation	<b></b>			
12. Review Comments	Legal Description			
13. Review				
	All comments are discoverable records, open to public review.			
В	Jack Next Save			

Step	Action	Required Fields
1.	Section 2: Transferring Organization - Review and Click 'Next'.	
	a. Optional: Add a contact	
2.	Section 3: Acquiring Organization - Review and Click 'Next'.	
	a. Optional: Add a contact	

Step	Action		Required Fields
3.	Section 4: Transfer Details – Type of Transfer, and Legal D Type Of Transfer*	Set Date of Acquisition, Date of Operation, Description.	Date of Acquisition Date of Operation Type of Transfer
	Gift Inheritance Legal Action Other Sale		
4.	Click Next		

E Form Navigation	Well I	EDD
1. Form Information	You like t	have the option of using a file to input data on this form. If you would * Indicates required field o do so, select "Yes" below.
2. Transferring Organization		
3. Acquiring Organization	● Ye	ou wish to submit Transfer Assets data using an Electronic Data Deliverable (EDD) template? *
4. Transfer Details		
5. Well EDD	Step	1: Download the EDD template.
6. Well Association	Step	2: Fill out all fields in the template.
7. Facility EDD	Step	3: Upload the completed EDD.
8. Facility Association		Browse
9. Document Upload	CI	ick Next to upload EDD. See template for specific instructions on filling out the fields.
10. Form Submit	No	te: Your EDD may take some time to populate in this form. If you would like to return later, you can save
11. Confirmation	an	a close, then visit the Forms in Progress section of your landing page to resume editing this form.
12. Review Comments		
13. Review	Back	Next Save

Step	Action	Required Fields
1.	Section 5: Well EDD – Select Yes or No to submit Electonic Data Deliverable (EDD) template.	Yes or No
	a. Clicking Yes displays instructions to download the template.	
2.	Click Next	

E Form Navigation	Θ	Well Ass	ociation						
1. Form Information		Pleas	e use grids and a ciated Wells grid,	rrow buttons to then click Actior	select Wells to i ns > Associate B	nclude in the tra ond to add a Bo	nsfer. Use check and No. to Wells	kboxes in the requiring a E	e Bond.
2. Transferring Organization	×	Se	ect Wells						ð
3. Acquiring Organization	×				▼ Advanc		Search		) <b>T</b>
4 Transfer Details			API	Well Desi	CurrentTy	CurrentSt	Lease Name	Field	
	•		0401320081	Souza 1	GAS	Plugged	Souza	Any Field	
5. Well EDD	✓		0402120061	Rehse 1	GAS	Plugged	Rehse	Any Field	
6. Well Association			0409520249	Bulkley 1	GAS	Plugged	Bulkley	Any Field	

		<b>T</b> Ad	dvanced Filter	ing Action	s 🗸 Search	1	\$
	API	Well De	Current	Current	Lease N	NewBon	Field
	04101200 95	Vierra et al 1	GAS	Plugged	Vierra et al		Any Field
	04101201 00	Buttes- Epperson et al 1	GAS	Plugged	Buttes- Epperson et al		Any Field
	89	Selectt whic Please Sele	h Bond to as	sociate with I	newly-acquire	ed Well(s)*	-ieid
	89	Selectt whic Please Sel	h Bond to as	sociate with । ▼ ्	newly-acquire	ed Well(s)*	-iela
	89	Selectt whic Please Sele Please Sele 0530000173	h Bond to as ect	sociate with । र ्	newly-acquire	ed Well(s)*	e
	89	Selectt whic Please Sele Please Sele 0530000175 701024	h Bond to as ect ect 524	sociate with r	newly-acquire Ca	ed Well(s) *	e C
×	89	Selectt whic Please Sele Disage Sele Disag	h Bond to as ect cct 524	sociate with r	newly-acquire Ca	ed Well(s) *	e

Step	Action	<b>Required Fields</b>
1.	Section 6: Well Association – Select well(s) to associate with transfer. Use the up/down arrow in between boxes to move wells. User can associate a bond with the transfer at this time. If no bond exists User will go to sub-process Create and Review Bond	
2.	Associate Bond – Select well(s) to associate bond on lower half of grid	
3.	Select Actions, then Add Bond Association	
4.	Select Bond	

Step	Action	<b>Required Fields</b>
5.	Click Save	

Form Navigation	θ	Facility EDD
1. Form Information		You have the option of using a file to input data on this form. If you would like to do so, select "Yes" below.
2. Transferring Organization	~	
3. Acquiring Organization	*	Do you wish to submit iransfer Assets data using an Electronic Data Deliverable (EDD) template? ^
4. Transfer Details	*	
5. Well EDD	*	
6. Well Association	~	Back Next Save

Step	Action	Required Fields
1.	<b>Section 7</b> : Facility EDD – Select Yes or No to submit Electonic Data Deliverable (EDD) template.	Yes or No
	b. Clicking Yes displays instructions to download the template.	
2.	Click Next	

Form Navigation	• Facility A	Association				
1. Form Information     2. Transferring Organization	Pleas Asso Bond Sel	se use grids and ar ciated Facilities gri I. lect Facilities	row buttons to sele d, then click Action	ct Facilities to include in s > Associate Bond to a	the transfer. Use dd a Bond No. to I	checkboxes in the Facilities requiring a
3. Acquiring Organization				▼ Advanced Filtering	Search	\$
4. Transfer Details		Facility ID	Туре	SubType	FacilityName	PLSS
5. Well EDD 🗸						
6. Well Association						
7. Facility EDD 🗸						
8. Facility Association						



Step	Action	<b>Required Fields</b>
1.	Section 8: Facility Association – Select Facility to associate with transfer. Use the up/down arrow in between boxes to move facilities.	
2.	Associate Bond – Select facility to associate bond on lower half of grid	
3.	Select Actions, then Add Bond Association	
4.	Select Bond	

Step	Action	<b>Required Fields</b>
5.	Click Next	

ocument Upload						
Select docume document.	nts to be uploa	ded, if appli	cable. Click Add New and	comple	ete all require	d fields to upload a
Uploaded	Document	s				
		Y Advan	ced Filtering Actions -	Se	earch	\$
Upload D	Uploade	Туре	Add New	ne	Size	Actions
			Export - Excel Export - PDF			

ocument Upload	×
	* Indicates Required Field
Opload New Document	Associate Existing WellSTAR Document
Internal Only	Confidentiality Requested
Category	
Production	Ψ
Type *	
	•
Relevant Date *	θ
	Ť.
Description *	'
All comments are discoverable reco	ords, open to public review.
Filename *	θ
Browse	
	Cancel Upload

1.       Section 9: Document Upload: Upload previously scanned documents       IF Uploading:         a.       Click Actions – Add New       Type	Step	Action	Required Fields
b. Enter Type Description Filename C. Enter Relevant Date d. Enter Description e. Browse for File to Upload f. Click Upload	1.	<ul> <li>Section 9: Document Upload: Upload previously scanned documents</li> <li>a. Click Actions – Add New</li> <li>b. Enter Type</li> <li>Imap</li> <li>I</li></ul>	IF Uploading: Type Relevant Date Description Filename

Declaration - Transferring Organization			
Submitter			
by submitting this form, both the reindusting party and the acquiring party certury that the acquiring party owns the mineral interest, holds a valid and effective lease, or holds a valid and effective operating contract, giving the acquiring party the right to operate the well(s) and facilities identified herein.			
Declaration - Acquiring Organization			
Declaration - Acquiring Organization			
Submitter By submitting this form, both the relinquishing party and the acquiring party certify that the acquiring party owns the mineral interest, holds a valid and effective lease, or holds a valid and effective operating contract, giving the acquiring party the right to operate the well(s) and facilities identified herein.			
I acknowledge the above statement.			
<ul> <li>I have entered all Bonds I wish to associate on Steps 6 and 8.</li> <li>*</li> </ul>			
Form Submit Preview			
Click the button below to preview your submission summary. Preview Submission Summary			
Submit Save			

Step	Action	Required Fields
1.	Section 10: Form Submit:	
	a. Add any associated online forms.	
	b. Add any comments regarding this transfer, click Add Comment	
2.	Declaration	
	Transferring Organization checks acknowledgement box.	
	<ul> <li>The form can be saved so the acquiring Organization can submit their declaration.</li> </ul>	
	Acquiring Organization checks acknowledge box.	
	<ul> <li>The form can be saved so the Transferring Organization can submit their declaration.</li> </ul>	
	b. Check the box to associate all bonds with this transfer.	

Step	ep Action				
	Note: Either Organization can enter the declaration first, then alert the second organization to enter their declaration.				
3.	Select the Preview Submission Summary to review the transfer.				
4.	Click Submit				
5.	Confirmation Message				
	Confirmation				
	Your form has been submitted successfully. You will be notified when a determination has been made. Pursuant to PRC section 3270.1, a person acquiring a production facility shall submit a Spill Contingency Plan to the Division within 90 days of acquisition.				
	Notes: WellSTAR creates tasks for District Offices and for Bond Administration.				
6.	Close page				

#### 2.0 Monitor Transfer

#### 2.1 Key Points

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

#### STEPS for Monitor Transfer

Transfers							Help		
	▼ Advanced Filtering Actions - Search								
ID ↓	T. O. Code	Transferring Organization	A. O. Code	Acquiring Organization	Transfer Assets	etermination Date +	Status		
<b>T</b>	<b></b>	<b>T</b>	<b>T</b>		Export - Excel	T	<b></b>		
1	S0325	Sacgasco, LLC	N1223	Andrew L. Newkirk	Export - PDF		Pending		
3	S0576	Salt Creek Oil LLC	N1223	Andrew L. Newkirk		11/21/2017	Pending		
4	E1100	Elk Hills Power, LLC	S0385	Sacramento Valley, LLC		12/14/2017	Pending		
5	A2500	Anacapa Oil Corporation	H5145	Hollywood Park Land Cor	npany, LLC	12/18/2017	Pending		

Step	Action	Required Fields
1.	From Home page, Navigate to Explore Data	
2.	Select Transfers	
3.	In Search box, enter criteria desired (advanced filtering is optional).	
4.	Click the Actions button	
5.	Select Export	