



User Reference Guide

Transfer Management

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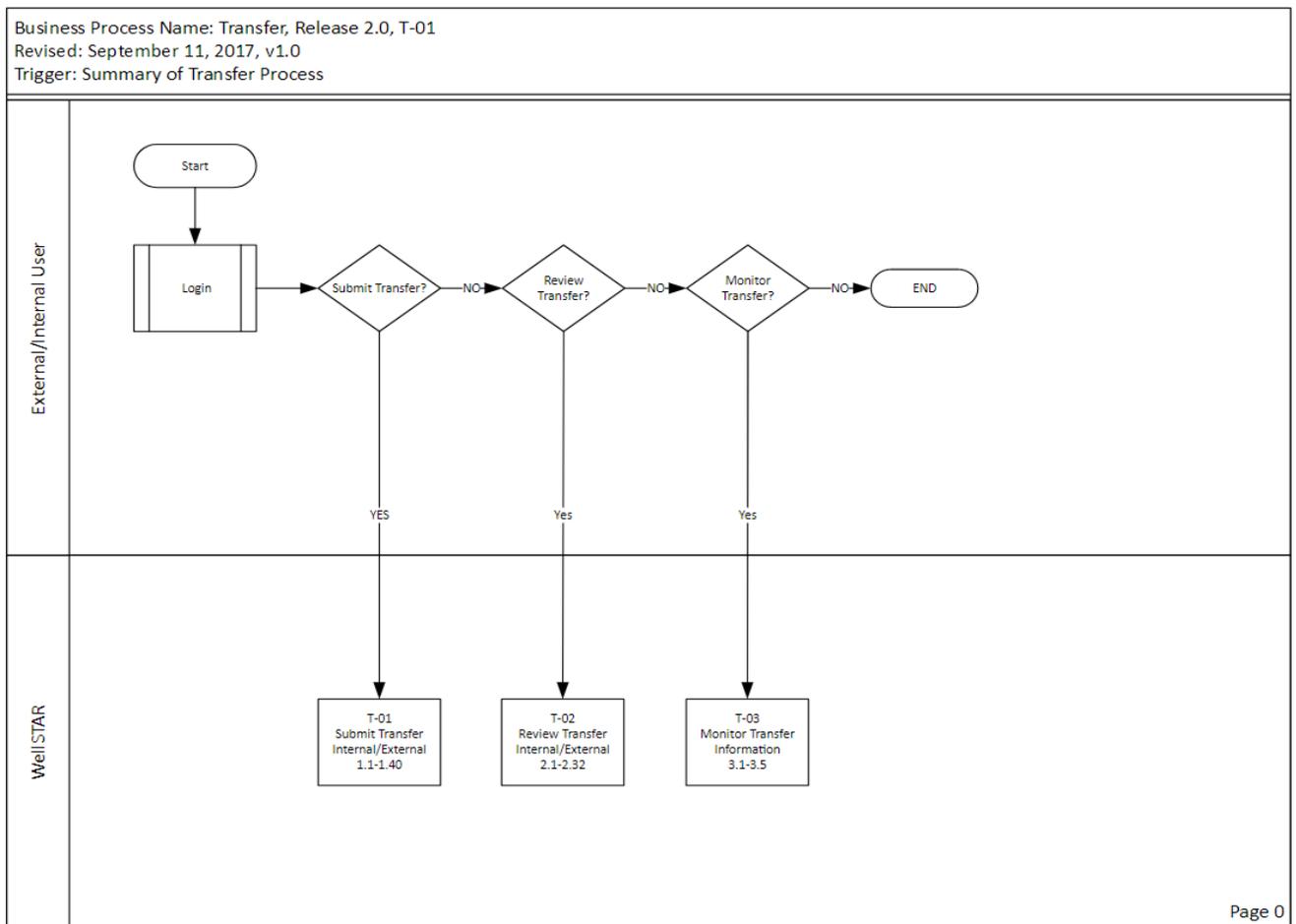
TRANSFER MANAGEMENT

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.

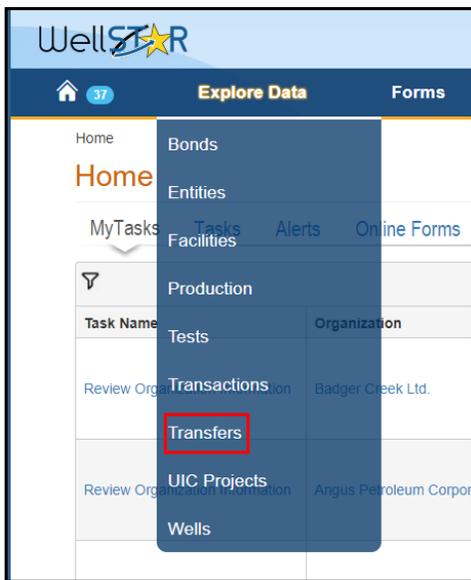
Lesson Objectives:

- 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



1.2 Steps to Create/Submit a Transfer

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

The screenshot shows a table titled "Transfers" with columns: ID, T. O. Code, Transferring Organization, A. O. Code, Acquiring Organization, Termination Date, and Status. Two rows are visible. The "Actions" dropdown menu is open for the first row, showing options: "Transfer Assets", "Export - Excel", and "Export - PDF".

ID	T. O. Code	Transferring Organization	A. O. Code	Acquiring Organization	Termination Date	Status
1	S0325	Sagasco, LLC	N1223	Andrew L. Newkirk	/15/2017	Pending
3	S0576	Salt Creek Oil LLC	N1223	Andrew L. Newkirk	/21/2017	Pending

The screenshot shows the "Transfer Assets" form. It includes a "Form Information" section with the following fields: "Form Name" (Transfer Assets), "Description" (required), "Transferring Organization" (required dropdown), "Acquiring Organization" (required dropdown), and a checkbox for "This is a one-way transfer". A "Form Navigation" sidebar on the left shows "1. Form Information" as the active step. Buttons for "Cancel" and "Save & Continue" are at the bottom.

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	

Transferring Organization

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	Actions
Sharon Armstrong	(916) 323-0427	sharon.armstrong@conservation.ca.gov	Submitter	
			Agent	

Add Contact

* Indicates required field

Is this contact already in WellSTAR?

Contact Role *

Find Person *

Contact Name

Phone Number

Email

Cancel Save

Transfer Details

Transferring Organization
Anacapa Oil Corporation

Acquiring Organization
Andrew L. Newkirk

Date Of Acquisition *
02/21/2018

Date Of Operation *
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 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.
02/21/2018

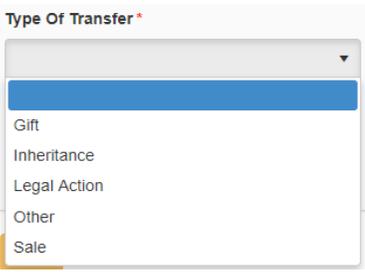
Type Of Transfer *

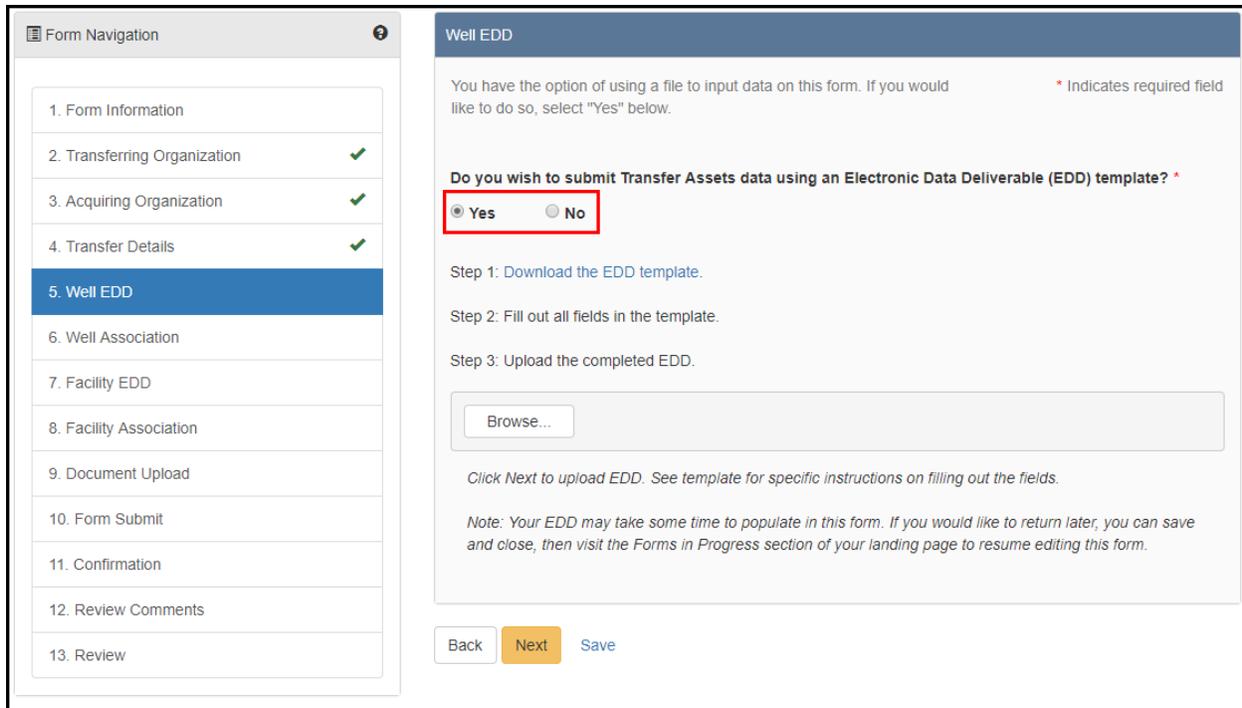
Legal Description

All comments are discoverable records, open to public review.

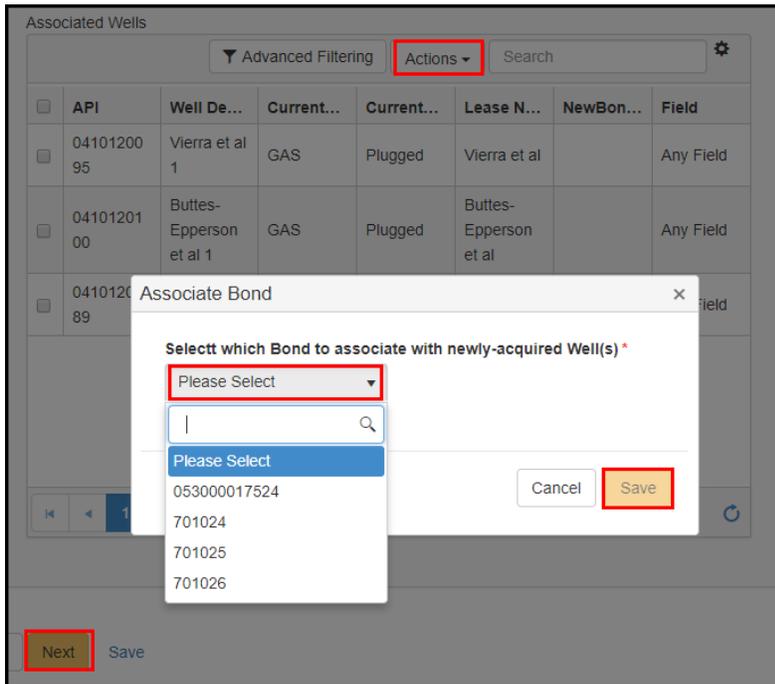
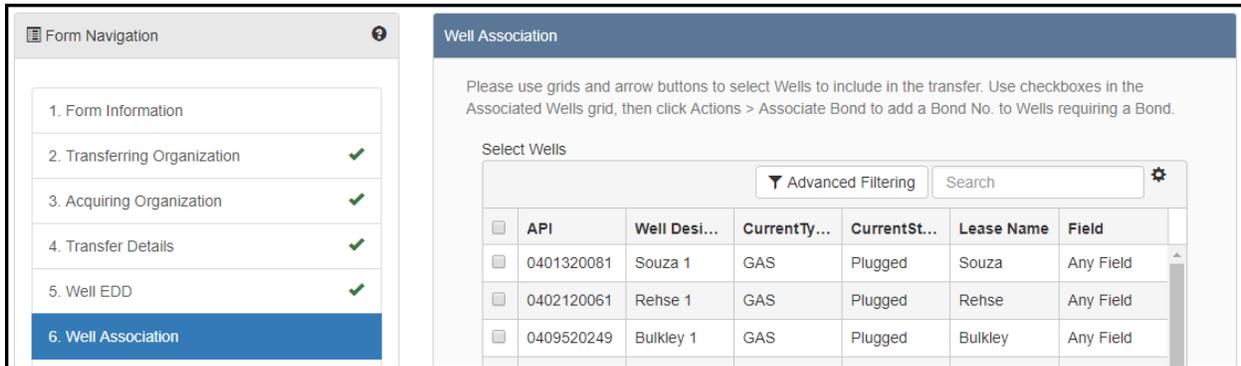
Back Next Save

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 – Set Date of Acquisition, Date of Operation, Type of Transfer, and Legal Description. 	Date of Acquisition Date of Operation Type of Transfer
4.	Click Next	



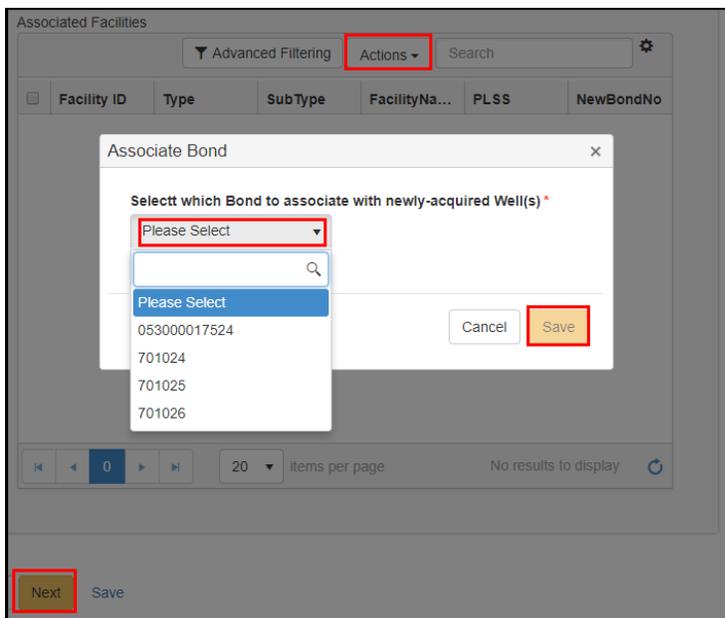
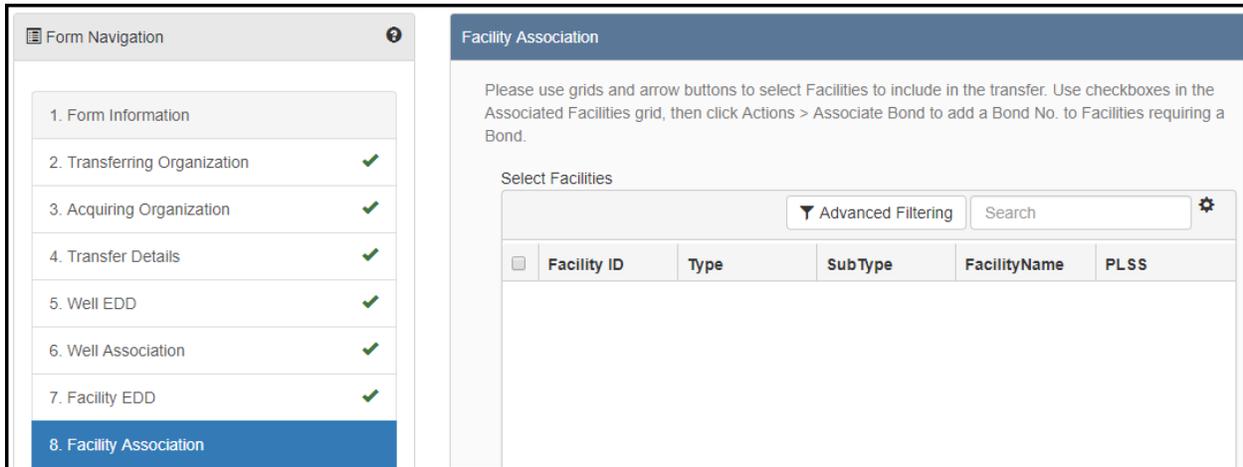
Step	Action	Required Fields
1.	Section 5: Well EDD – Select Yes or No to submit Electronic Data Deliverable (EDD) template. a. Clicking Yes displays instructions to download the template.	Yes or No
2.	Click Next	



Step	Action	Required Fields
1.	<p>Section 6: Well Association – Select well(s) to associate with transfer. Use the up/down arrow in between boxes to move wells.</p>  <p>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.</p>	
2.	Associate Bond – Select well(s) to associate bond on lower half of grid	
3.	Select Actions, then Add Bond Association	
4.	Select Bond	

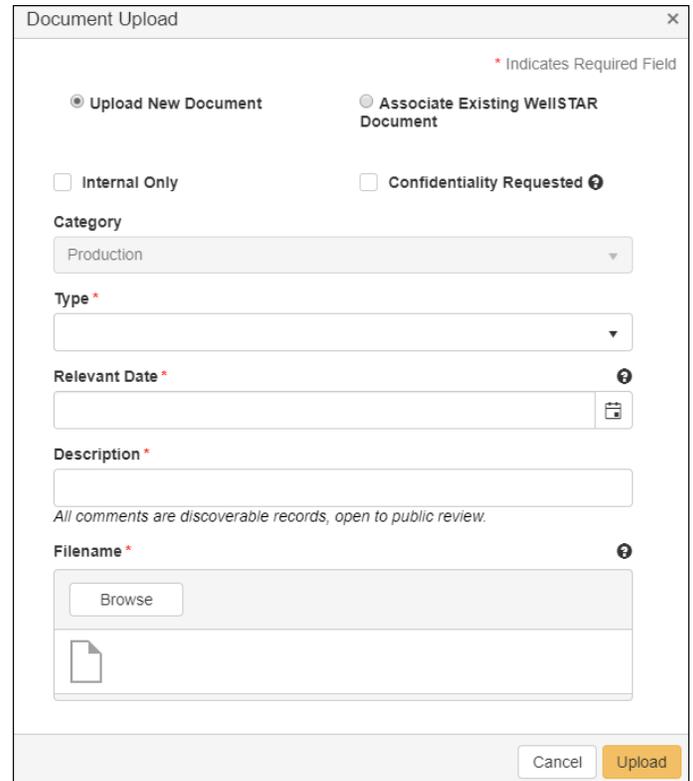
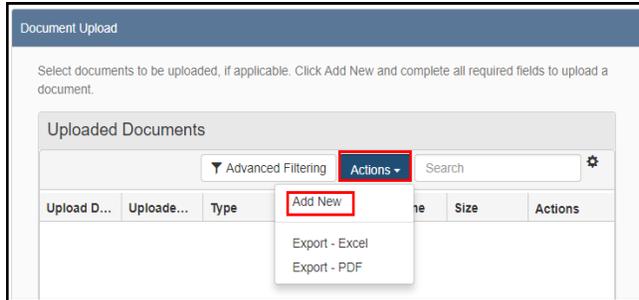
Step	Action	Required Fields
5.	Click Save	

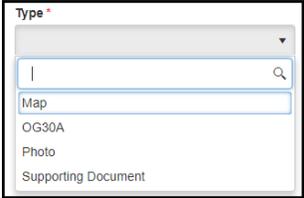
Step	Action	Required Fields
1.	Section 7: Facility EDD – Select Yes or No to submit Electronic Data Deliverable (EDD) template. b. Clicking Yes displays instructions to download the template.	Yes or No
2.	Click Next	



Step	Action	Required Fields
1.	<p>Section 8: Facility Association – Select Facility to associate with transfer. Use the up/down arrow in between boxes to move facilities.</p>  <p>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'.</p>	
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	Required Fields
5.	Click Next	



Step	Action	Required Fields
1.	<p>Section 9: Document Upload: Upload previously scanned documents</p> <ol style="list-style-type: none"> Click Actions – Add New Enter Type  <ol style="list-style-type: none"> Enter Relevant Date Enter Description Browse for File to Upload Click Upload 	<p>IF Uploading:</p> <p>Type Relevant Date Description Filename</p>

Declaration - Transferring 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.

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.

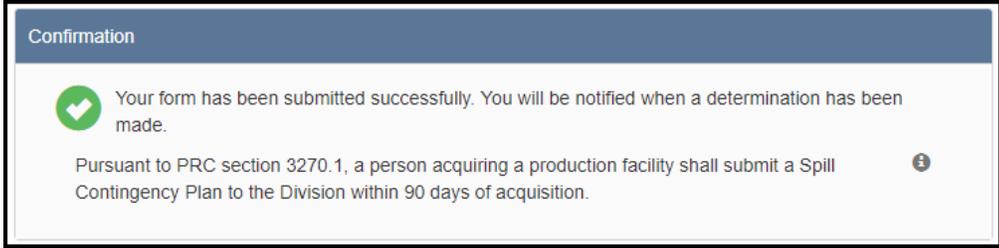
I have entered all Bonds I wish to associate on Steps 6 and 8.

Form Submit Preview

Click the button below to preview your submission summary.

Preview Submission Summary

Step	Action	Required Fields
1.	<p>Section 10: Form Submit:</p> <ul style="list-style-type: none"> a. Add any associated online forms. b. Add any comments regarding this transfer, click Add Comment 	
2.	<p>Declaration</p> <p>Transferring Organization checks acknowledgement box.</p> <ul style="list-style-type: none"> a. The form can be saved so the acquiring Organization can submit their declaration. <p>Acquiring Organization checks acknowledge box.</p> <ul style="list-style-type: none"> a. The form can be saved so the Transferring Organization can submit their declaration. b. Check the box to associate all bonds with this transfer. 	

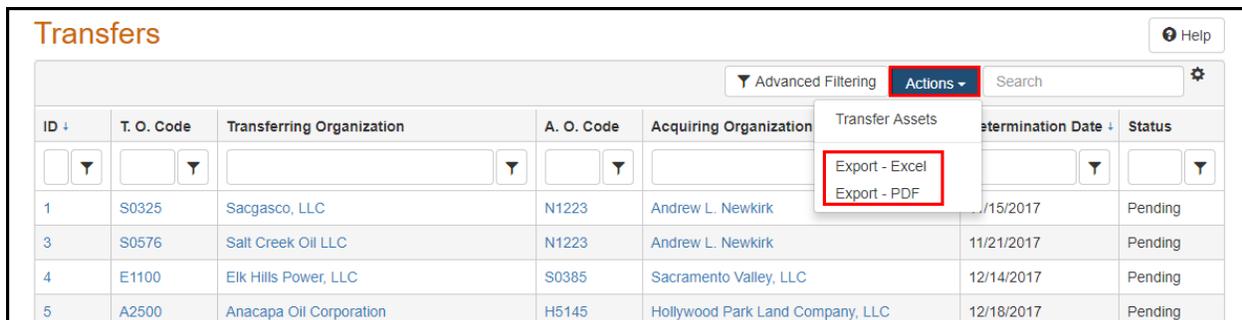
Step	Action	Required Fields
	Note: Either Organization can enter the declaration first, then alert the second organization to enter their declaration.	
3.	Select the Preview Submission Summary to review the transfer.	
4.	Click Submit	
5.	<p>Confirmation Message</p>  <p>Notes: WellSTAR creates tasks for District Offices and for Bond Administration.</p>	
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



ID	T. O. Code	Transferring Organization	A. O. Code	Acquiring Organization	Termination Date	Status
1	S0325	Sacgasco, LLC	N1223	Andrew L. Newkirk	11/15/2017	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 Company, 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	

