



California
**Department of
Conservation**
Oil, Gas, & Geothermal Resources

WellSTAR

User Reference Guide

Scheduler Page

Schedule Test or Inspection Form

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COURSE OVERVIEW

Course Description

This User Guide will provide an overview of the Scheduler page, Schedule Test or Inspection form and Bulk Scheduling form. Annotated images of the page and forms with instructions for required usage are provided below.

The WellSTAR Scheduler page allows external users to view all Scheduled Events for their organization within the Start Date and End Date range set on the page.

The WellSTAR Schedule Test or Inspection form allows external users to schedule inspections and tests, and update upcoming scheduled tests or inspections if the scheduled date/time is more than 24 hours in the future.

The WellSTAR Bulk Scheduling form allows external users to schedule inspections and tests, and update upcoming scheduled tests or inspections if the scheduled date/time is more than 24 hours in the future.

Key Terms and Concepts

Key Term	Definition
Scheduler	The part of WellSTAR used to find scheduled inspections. If a test or inspection is already scheduled, it can be updated if the scheduled date or time changes. Once the scheduled date and time is within 24 hours, the District Office must be contacted to adjust the schedule for the event.
Schedule Test or Inspection Form	A WellSTAR form which can be used to add a new scheduled test or inspection, or update an upcoming scheduled test or inspection. Note: Scheduled Tests and Inspections cannot be updated or canceled within 24 hours of the Scheduled Date/Time and after the Scheduled Date/Time has passed. District Office should be contacted for changes to Tests or Inspections within 24 hours from the scheduled Date/Time.
Bulk Scheduling Form	A WellSTAR form which can be used to add multiple new scheduled events, or update multiple events already scheduled if they are more than 24 hours in the future.
Event	A Test or Inspection.
Inspection	A field activity as reported by an operator to be witnessed by CalGEM which an Inspection record may be written for by CalGEM.
Test	A field activity as reported by an operator or contractor which test results may be uploaded against using the Upload Test Results form.

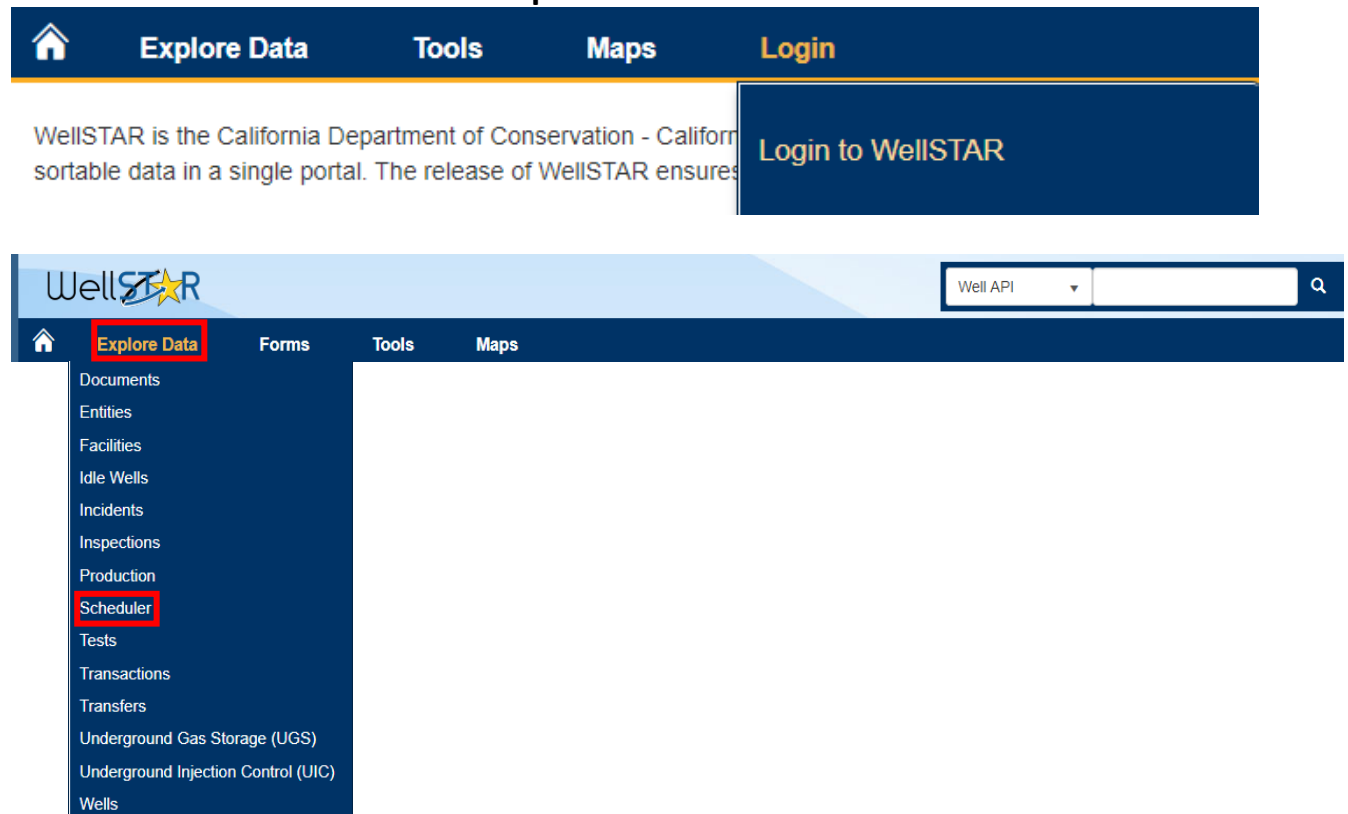
1 SCHEDULER PAGE

Lesson Objectives:

- Find Scheduled tests and inspections for your Organization

Examples within this Training are developed solely for training purposes.

1.1 Find Scheduled Tests and Inspections



Step	Action
1.	From the desktop, open browser
2.	Navigate to WellSTAR
3.	Login to your Organization
4.	Click <i>Explore Data</i>
5.	Click <i>Scheduler</i>

The screenshot shows the Scheduler interface. At the top, there are navigation tabs: Home, Explore Data, Forms, Tools, Maps, and Advanced Search. Below these, the page title is 'Scheduler' and the user is identified as 'Hello UAT TesterPeter, Aera Energy, LLC'. A search bar is visible on the right.

At the top left, there are two date input fields: 'Start Date' (01/30/2023) and 'End Date' (02/10/2023), with a 'Submit' button to the right. A red box highlights these fields.

Below the date filters is a grid of data. The grid has columns for Scheduled Date/Time, Event ID, Event Type, Operator, Subject ID, Subject Name, Event Status, Assigned CalGEM Engineer, and Actions. The first row is highlighted in blue. A red arrow points to the 'Grid Actions' button above the grid. Another red arrow points to the 'Row Actions' button below the grid. A third red arrow points to the 'Actions' dropdown menu in the first row of the grid.

Scheduled Date/Time	Event ID	Event Type	Operator	Subject ID	Subject Name	Event Status	Assigned CalGEM Engineer	Actions
01/30/2023 12:00 AM	138932	Pressure Test - Casing Only	Aera Energy LLC	0403044272	Belndge V 8554A-2	Scheduled		Actions -
02/03/2023 08:00 AM	138933	Reservoir Test - Temperature Survey	Aera Energy LLC	0403067534	Unspecified 665C-12	Scheduled		Actions -
02/05/2023 10:00 AM	138934	Radioactive Tracer Survey	Aera Energy LLC	0403044272	Belndge V 8554A-2	Scheduled		Actions -

Step	Action
1.	Select <i>Start Date</i>
2.	Select <i>End Date</i>
3.	Click <i>Submit</i>
	Note: Results will not appear until the Submit button is clicked. Results then populate for Scheduled Dates within the Start and End Date selected.
4.	Adjust applied filters using <i>Advanced Filtering</i> to conduct search
	Note: Applied filters can be viewed by hovering over empty funnel icon, upper left corner of Scheduler Grid. Note: Default filter to remove Canceled events.
5.	Add additional columns using gear icon, upper right corner of Scheduler grid, to aid filtering as needed
6.	Click <i>Grid Actions</i> and <i>Export – Excel</i> to view Scheduler list in Excel
7.	To Schedule NEW events, Click <i>Grid Actions</i> and <i>Schedule Test or Inspection</i> or <i>Bulk Scheduling</i> to launch the Schedule Test or Inspection Form or Bulk Scheduling Form .
	Note: Cannot schedule new events within 24 hours, contact appropriate District Office for scheduling of events within 24 hours.
8.	To UPDATE EXISTING events, Click <i>Row Actions</i> and <i>Edit Details</i> to launch the Schedule Test or Inspection Form in context of the Scheduled Event ID.
	Note: Events with a Scheduled Date and Time within 24 hours will need to be updated by CalGEM, contact the appropriate District Office for updates to the scheduled event.

1.1.1 Key Points

- Events that are scheduled can be viewed in the Scheduler page within the Date Range selected.
- New Events can be scheduled using the Schedule Test or Inspection form or Bulk Scheduling form.
- Existing Scheduled Events with a Scheduled Date and Time more than 24 hours ahead of current time, can be updated by selecting Row Actions – Edit Details, or Grid Actions - Bulk Scheduling form.
- Existing Scheduled Events with a Scheduled Date and Time within 24 hours or in the past can only be Canceled or Updated by a District Office.

2 SCHEDULE TEST OR INSPECTION FORM

2.1 Launching Schedule Test or Inspection Form

The Schedule Test or Inspection form can be used to schedule a new event, or update an existing event. Where the form is initiated from will determine if it will be creating a new scheduled event, or updating an existing event that was already scheduled. Once the form is submitted the updates within the form will be made and viewable on the Scheduler Page.

Schedule New Events:

Online Forms Grid – Schedule Test or Inspection form

Scheduler Page – Grid Actions – Schedule New Event

Well Detail – Summary Page – Actions – Schedule a Test or Inspection

Well Detail – Tests Page – Test Grid Actions – Schedule Test

Update Existing Events:

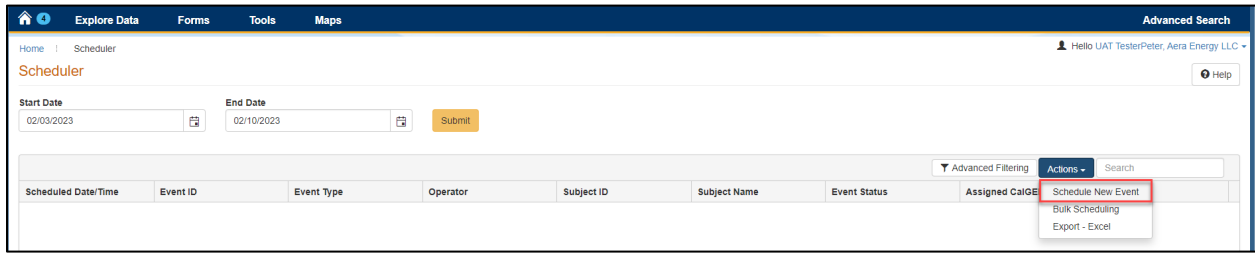
Scheduler Page – Row Actions – Edit Details

Well Detail – Tests Page – Test Row Actions – Edit Details

See the below sections for Schedule Test or Inspection Form for expected form usage when scheduling a new event or updating an existing event.

2.2 Form Steps – Schedule New Event

To Launch the Schedule Test or Inspection form intending to Create a New Scheduled event from Scheduler Page, select Grid Actions – Schedule New Event.



Section 1. Form Information

Form Information [Hide Form Navigation]

Operators scheduling a test or inspection after normal business hours (between 5pm-8am), or on a weekend or holiday must contact the local District office to schedule with the on-call engineer. Using WellSTAR to schedule tests that are not compliant with UIC or UGS scheduling and notification regulations may result in violations issued to the operator. * Indicates Required Field

Northern District

- Orcutt (805) 937-7246
- Ventura (805) 937-7246
- Sacramento (916) 322-1110

Inland District (661) 322-4031

Southern District (562) 637-4400

Form Name
Schedule Test or Inspection

Organization
Aera Energy LLC

Test or Inspection Subject *

Facility
 Tank/ Vessel
 Lease
 Project
 Well
 Pipeline Segment

Description *

All comments are discoverable records, open to public review.

Step	Action	Required Fields
1.	You will be taken to Section 1. Form Information. Start by selecting the Test or Inspection Subject by clicking on the radio button. Note: The selection of Subject Type determines the available test or inspection types available later in the form and will be locked to the form once this step is saved.	Test or Inspection Subject
2.	Enter in a Description for this Schedule Test or Inspection Form. NOTE: It is recommended to enter “ Well Name/API, Facility Name, Lease Name, or Project Number ” in Description so that this information can also be used to locate the form. Example: Lake View 2 030-12345	Description

Section 2. Operator Information

Operator Information [Hide Form Navigation]

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
Aera Energy LLC (A0610)

Type of Organization
Corporation

Organization Primary Address
10000 Ming Avenue
Bakersfield, CA 93311-1301

Organization Primary Phone Number
(661) 665-5000

Ext

Contacts

Advanced Filtering Actions ▾

Name ↑	Phone Number	Email	Role	Actions
Jeffrey Young	(661) 665-5693	jayoung@aeraenergy.comx	Agent	
UAT TesterPeter		uattester06@gmail.comxx	Submitter	

Add Contact ×

* Indicates Required Field

Is this contact already in WellSTAR and associated to the current Organization?

Contact Role *

Find Person *

Contact Name

Phone Number

Email

Step	Action	Required Fields
1.	Review organization details for correctness. <i>Note:</i> changes cannot be made to organization details here.	
2.	If a relevant person is not listed on the contacts list, click Actions .	
3.	Click Add Contact .	
4.	Complete Add Contact dialogue box that appears.	Contact Role, Find Person (if contact is already in WellSTAR) Contact Name, Phone Number, Email (if contact is not already in WellSTAR)
5.	Click Save .	
6.	Click Next .	

Section 3. Schedule Details

Schedule Details [Hide Form Navigation]

Please use grids to select the subject for which your Test(s) or Inspection(s) will be associated. * Indicates Required Field

Select Well

	API	Well Designation	Current Type	Current Status	Field
<input type="radio"/>	0401901132	0-1-29	Oil & Gas	Plugged & Abandoned	Coalinga
<input checked="" type="radio"/>	0401901310	0-1-30	Observation	Active	Coalinga
<input type="radio"/>	0401901141	0-3-29	Observation	Active	Coalinga
<input type="radio"/>	0401901143	0-4-29	Observation	Active	Coalinga
<input type="radio"/>	0403125982	1	Dry Hole	Plugged & Abandoned	Any Field
<input type="radio"/>	0401900648	1	Oil & Gas	Plugged & Abandoned	Coalinga
<input type="radio"/>	0401900705	1	Oil & Gas	Plugged & Abandoned	Coalinga
<input type="radio"/>	0401901629	1	Oil & Gas	Plugged & Abandoned	Coalinga
<input type="radio"/>	0401901131	1	Oil & Gas	Plugged & Abandoned	Coalinga
<input type="radio"/>	0401901359	1	Oil & Gas	Plugged & Abandoned	Coalinga
<input type="radio"/>	0402917448	1	Oil & Gas	Plugged & Abandoned	Cymric

20 items per page Viewing 1 - 20 from 58302 results

Associated Well*

	API	Well Designation	Current Type	Current Status	Field
<input type="radio"/>	0401901310	0-1-30	Observation	Active	Coalinga

Date	7/10/2019	Time	7:00 AM
Type	Radioactive Tracer Survey ✕		
Status	Scheduled	Priority	<input type="checkbox"/> Do Not Waive
Assigned DOGGR Engineer	Mykal Stoner		
Dispatching Notes	Aaron WAC (123) 456-7890		

Step	Action	Required Fields
1.	Click on the radio button next to the desired subject. Note: Subjects listed in the Select Grid are those currently associated to the Organization. Subject types are listed based on the selection on Form Step 1.	
2.	Click the down arrow button when the desired subject(s) are selected. The selected subject(s) moved into the Associated table will have a new event scheduled when this form is submitted using the additional schedule details provided below. Note: At least One subject must be added into the Associated table.	Associated Subject Table (requires at least one subject in the table)
3.	Assign the Date and Time the Event is Scheduled for. Once form is submitted this will be assigned as the Scheduled Date/Time. Note: The Scheduled Date and Time are editable after the event is created.	Date, Time
4.	Assign the Type of the Event. Once form is submitted, this will be assigned as the Event Type. Note: Type is not editable after the event is created.	Type
5.	Assign Dispatching Notes to the Event. These will be used by the District to coordinate witnessing activities.	
6.	Click Next .	

Section 4. Form Submit

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.

Step	Action	Required Fields
1.	If any form needs to be added, click Add Form . This creates a popup. Type in the form ID or name and click “Save” .	
2.	If any comments pertaining to the submittal is needed, type in the comment and click Add Comment .	
3.	When ready to acknowledge, click the box label “I hereby certify...” . This auto-populates the user’s name who is filling out the form.	I hereby certify....
4.	Click the button “Preview Submission Summary” to generate the submission.	
5.	When satisfied with the submission, click “Submit” .	

Section 5. Confirmation

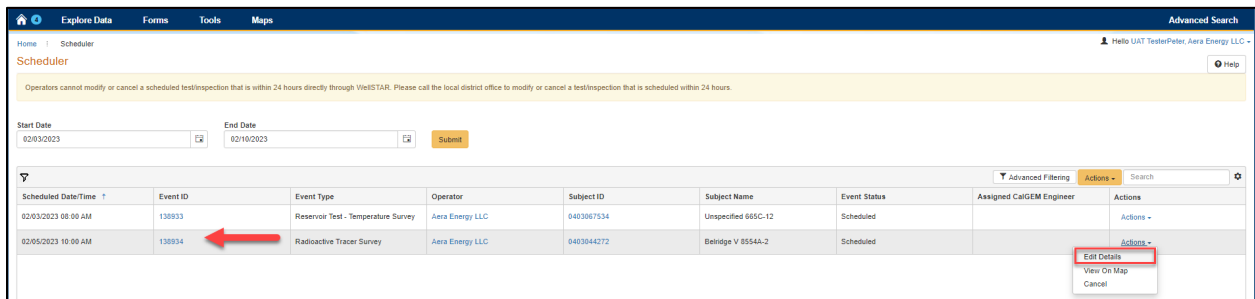
Step	Action	Required Fields
1.	Remain on Confirmation page until background processing is complete. NOTE: The form will go through a background process. Refresh until the banner across the top of the page goes away, signifying that background processing is complete.	

2.2.1 Key Points

- New Events are able to be scheduled with the Schedule Test or Inspection form when it is created using:
 - Online Forms Grid – Schedule Test or Inspection form
 - Scheduler Page – Grid Actions – Schedule New Event
 - Well Detail – Summary Page – Actions – Schedule a Test or Inspection
 - Well Detail – Tests Page – Test Grid Actions – Schedule Test

2.3 Form Steps – Update Existing Event

To Launch a Schedule Test or Inspection form intending to update an existing event, locate that Event on Scheduler Page and use Row Actions – Edit Details. Events with a Scheduled Date/Time within 24 hours will generate the yellow warning message when Edit Details is selected.



Section 1. Form Information

Step	Action	Required Fields
1.	You will be taken to Section 1. Form Information. Confirm the Organization and Test or Inspection Subject type match your intended update.	

	Note: This form was created in context of a scheduled event, so the Test or Inspection Subject is already assigned to the form.	
2.	Enter in a Description for this Schedule Test or Inspection Form. NOTE: It is recommended to enter “ Well Name/API, Facility Name, Lease Name, or Project Number ” in Description so that this information can also be used to locate the form. Example: Lake View 2 030-12345	Description
3.	Click Save and Continue .	

Form Information
[Hide Form Navigation]

Operators scheduling a test or inspection after normal business hours (between 5pm-8am), or on a weekend or holiday must contact the local District office to schedule with the on-call engineer. Using WellSTAR to schedule tests that are not compliant with UIC or UGS scheduling and notification regulations may result in violations issued to the operator. * Indicates Required Field

Northern District

Orcutt	(805) 937-7246
Ventura	(805) 937-7246
Sacramento	(916) 322-1110

Inland District (661) 322-4031
Southern District (562) 637-4400

Form Name
Schedule Test or Inspection

Organization
Aera Energy LLC

Test or Inspection Subject*
Well

Description*

Example

All comments are discoverable records, open to public review.

Section 2. Operator Information

Operator Information [Hide Form Navigation]

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 Aera Energy LLC (A0610)	Type of Organization Corporation
Organization Primary Address 10000 Ming Avenue Bakersfield, CA 93311-1301	
Organization Primary Phone Number (661) 665-5000	Ext

Contacts

Advanced Filtering Actions ▾

Name ↑	Phone Number	Email	Role	Actions
Jeffrey Young	(661) 665-5693	jayoung@aeraenergy.comx	Agent	
UAT TesterPeter		uattester06@gmail.comxx	Submitter	

Add Contact ×

* Indicates Required Field

Is this contact already in WellSTAR and associated to the current Organization?

Contact Role *

Find Person *

Contact Name

Phone Number

Email

Step	Action	Required Fields
1.	Review organization details for correctness. <i>Note:</i> changes cannot be made to organization details here.	
2.	If a relevant person is not listed on the contacts list, click Actions .	
3.	Click Add Contact .	
4.	Complete Add Contact dialogue box that appears.	Contact Role, Find Person (if contact is already in WellSTAR) Contact Name, Phone Number, Email (if contact is not already in WellSTAR)
5.	Click Save to save Add Contact Pop-Up.	
6.	Click Next .	

Section 3. Schedule Details

Schedule Details
[Hide Form Navigation]

Please use grids to select the subject for which your Test(s) or Inspection(s) will be associated. * Indicates Required Field

Associated Well *

Advanced Filtering

⚙

	API	Well Designation	Current Type	Current Status	Field
<input type="radio"/>	0403044272	Belridge V 8554A-2	Waterflood	Active	Belridge, South

⏪ ⏩ 1 ⏪ ⏩ 5 items per page
 Viewing 1 - 1 from 1 results ↻

Date *

📅

Time *

🕒

Type *

Radioactive Tracer Survey

Dispatching Notes/Field Contact (Name, Number, Notes)

MIT Part 2

Step	Action	Required Fields
1.	<p>Confirm the Associated Subject is the intended subject that you are intending to update an existing scheduled event for.</p> <p>Note: This form was created in context of a scheduled event, so the Associated Subject is not editable.</p>	
2.	<p>Assign the Updated Date and Time the Event is updating to. Once form is submitted this will be updated as the Scheduled Date/Time.</p> <p>Note: The Updated Scheduled Date and Time are not able to be assigned in the past.</p>	Date, Time
3.	Assign updated Dispatching Notes to the Event. These will be used by the District to coordinate witnessing activities.	
4.	Click Next .	

Section 4. Form Submit

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

Back

Submit

Save

Step	Action	Required Fields
1.	If any form needs to be added, click Add Form . This creates a popup. Type in the form ID or name and click “Save” .	
2.	If any comments pertaining to the submittal is needed, type in the comment and click Add Comment .	
3.	When ready to acknowledge, click the box label “I hereby certify...” . This auto-populates the user’s name who is filling out the form.	I hereby certify....
4.	Click the button “Preview Submission Summary” to generate the submission.	
5.	When satisfied with the submission, click “Submit” .	

Section 5. Confirmation

Step	Action	Required Fields
1.	Remain on Confirmation page until background processing is complete. Once complete, the updates to the Scheduled Event will be viewable on the Scheduler Page. NOTE: The form will go through a background process. Refresh until the banner across the top of the page goes away, signifying that background processing is complete.	

2.3.1 Key Points

- Events can have the Scheduled Date/Time or Dispatching Notes updated if they are more than 24 hours in the future.
- To update Existing Schedule Events, use:
 - Scheduler Page – Row Actions – Edit Details
 - Well Detail – Tests Page – Test Row Actions – Edit Details