

Release Notes - R2.0 4/30/2018

The purpose of release notes is to address any known defects and associated workarounds for Release 2.0 implementation on 4/30/2018.

This document will provide descriptions of each capability and the functionality being implemented within each capability.

Release 2.0 capabilities being implemented are:

- Bond Management
- Entity Management
- Facilities Management
- General (Lease)
- Transactions
- Transfers
- Production
- UIC
- Well Management

Bond Management

There are three major processes in the Division's current Bond Management workflow that occur today: New Bond Received, Bond Release, and Bond Verification.

The New Bond Received process describes how a bond would be received and processed by CalGEM, highlighting steps for the District Office, Headquarters (HQ) Bond Coordinator, and CalGEM Webmaster actors. The pre-WellSTAR process utilizes the CalWIMS, Bond Log, and Cash Bond Log tools.

The external users can submit forms online and upload documents, then view their statuses when the forms are dispositioned internally.

Specific functionality addressed in this area:

- Create Bond
- Maintain Bond
- Release Bond
- Monitor Bond Data

The External/internal users can submit a request for new bond then WellSTAR creates a task for internal users to review the form, either approving or denying it. The system generates a unique Bond Number and Correspondence Letter with all the information of the bond when the form is approved. It sends an alert to Operator and generates an email with review status.

The Bond Release process describes how a bond would be released by CalGEM, highlighting steps for the District, HQ Bond Coordinator, Operator, and Surety/Indemnity Company actors. The pre-WellSTAR process utilizes the CalWIMS, Bond Log, and Cash Bond Log tools.

Entity Management

There are two major processes in the Division's current Entity Management workflow that occur today: Operator Change of Information Request and Operator-Agents Information Monthly FTP site update. For details on these As-Is processes see *Entity Management As-Is Business Processes*.

The Operator Change of Information Request process describes how operators would communicate a desire to change their information. The process highlights steps for the Headquarters (HQ) Electronic Data Processing (EDP) Unit, HQ Bond Coordinator, Operators, and District Office actors.

The Operator-Agents Information Monthly File Transfer Protocol (FTP) site update process describes how the CalGEM public site is updated with new information on operators and/or agents. The process highlights steps for the CalGEM Webmaster and HQ Bond Coordinator actors. The pre-WellSTAR process utilizes the Agents Database and the Public Website tools.

In Release 2.0 the External/internal users have the functionality to create Operators, Organizations, and an Individual through Organization Questionnaire form. The existing Contact Questionnaire and Designation of Agent can still be completed and received by the Division in paper form and internal users create on behalf of the external user.

The external users can submit forms online and upload documents, then view their statuses when the forms are processed internally. The submitted form creates a task for the internal user to review received form then the system generates alerts and emails notifying external users regarding the status of the form (Accepted or Reject).

Specific functionality addressed in this area:

- Create Individual or User (Internal and External Users)
- Create Workgroup
- Create Organization
- Modify Entity
- Modify Role

Facility Management

The Facility Management capability details the process where External/internal users submit the form in WellSTAR, describing how internal users review and processes the forms. The external users can submit forms online and upload documents, then view their statuses when the forms are dispositioned internally.

The business processes for Facilities Management are:

- Create and Review Facility

- Create and Review Plan Submission (Spill Contingency Plan, Lease Restoration Plan, Pipeline Management Plan)
- View Facility

After the Facility Information or Plan Submission form has been submitted WellSTAR creates a task for Districts based on the location of the well and facility (Coastal District, Inland District, Southern District, Northern District) to complete the internal review process and make a final determination. Also, it creates tasks for review to the GIS workgroup (if applicable) and for the Bond Review workgroup. The system sends an alert to Operator and generates an email with review status.

General (Lease)

The administrative and general capabilities are specific to WellSTAR and not directly related to a capability.

Specific functionality addressed in this area:

1. Manage Task
2. Upload Document
3. Create Document
4. Generate Notice
5. Generate Report
6. Search WellSTAR
7. Access Online Help
8. Create Comments

In Release 2.0 WellSTAR provides the Lease Process capability. It allows for Internal/external users to create and maintain the leases through online form. The submission form generates a task for internal users to review and process the form. It reviewed by the appropriate Workgroup depending on the Lease location (Coastal, Inland, Southern, Northern District). The internal users approve or return the Lease Information form and notify Operator.

These are the business processes:

- Create and Review Lease Information
- Maintain and Review Lease Information
- View Lease Information

The View Lease provides the view capability for both External and internal users regarding Lease Information. The internal user can extract the reports to keep track of the Lease status.

Transactions

The Transactions capability details the process for internal users to manually enter Operator Transaction records in WellSTAR through an online form. The Internal/external users can monitor the transactions and view/export an Operator's balance or individual transactions. Also, and internal users can reconcile CalGEM payment records with CalGEM Accounting's payment deposits to ensure the correct payments are being processed and recorded.

There are three business processes:

- Enter Transaction
- Monitor Transactions
- Reconcile Payments

The Transaction records include payments, fees, penalty fees, interest, credits, and debits. As a rule, fees and penalty fees will be generated at the source capability and linked to the Transactions and Associated Fees views. The modify amount owed for any type of transaction will be associated to that fee.

Below are the different Types of Payments:

- CalGEM Processed Payments(Payments)
- State Controller's Office (SCO) Processed Payments
- Fees and Penalty Fees
- Interest
- Credits and Debits

External Users cannot make any changes to Transactions in the system. Authorized internal users can view and edit Transactions for any Operator.

WellSTAR runs a Batch job daily for automating the process of identifying past due fees and triggering subsequent actions. The internal users reconcile CalGEM payment records with CalGEM Accounting's payment deposits. The system will store and track records of Transactions while Accounting handles the actual financial deposits. The Payments workgroup regularly will be able to cross-check records with Accounting's records to ensure the correct payments are being processed and recorded. If discrepancies are found between the records in WellSTAR and CalGEM Accounting deposit, the internal user may need to take action inside and/or outside of WellSTAR to solve the issue. WellSTAR will serve to provide details of all entered transactions and present information in an organized and filterable list.

Transfer Management

The Transfer Management capability details the process where external users submit the Transfer Assets form to create and submit a well or facility transfer in WellSTAR. The internal users can submit the forms on behalf of the operators.

In Release 2.0 the external users can submit forms online, upload documents, and view statuses when the forms are processed internally. WellSTAR generates alerts and emails notifying external users regarding the status of the form (Accepted or Return). It creates tasks for District Offices and for Bond Administration for review.

There are two levels of the review process:

1. Initial review that is completed by the Districts where wells or facilities are located including the Bond group. Only on completion of the review statuses by both the groups (District and Bond), WellSTAR creates the final review task for approval.

2. Final Review completed by internal users that will determine the approval of the form.

The system sends notification of application review (Approved or Returned).

The Monitor Transfer Process provides the functionality for internal users view data and create the reports.

Production

The Production capability details the process where External/internal users submit the form in WellSTAR and describes how internal users review and processes the forms. The external users can submit forms online, upload documents, and view the statuses when the forms are dispositioned internally.

The Business Processes for Production are:

- Submit and Review Monthly Data
- Submit and Review Quarterly Data
- Submit and Review Annual Data
- Submit Reconcile Production Data
- Submit Annual Assessment and Generate Notice of Assessment
- Monitor Monthly/ Quarterly/ Annually Submitted Data

Submit and Review Monthly Data

WellSTAR allows Operators to report electronically oil, gas, and water production data to CalGEM monthly. The internal users can submit the form on behalf of external users. Upon submission, the Department reviews the submitted information and selects a determination. An accepted form will save the monthly production data to the well record in WellSTAR. Also, it creates a workflow task for internal users to review the form and set the review status to either Approved or Returned. The system sends an alert to Operator and generates an email with review status.

Submit and Review Quarterly Data

The Operators can report water usage production, injection, and disposition data online to CalGEM on a quarterly basis. The submitted forms will go for the Internal review.

This process involves the following steps:

- external users with access to WellSTAR fill the form electronically.
- external users with no access to WellSTAR, go into district office to complete the form.

The system displays errors if the required fields are not populated or the business rules are not met and the user corrects errors before submits the form. The submission form creates a workflow task for internal users to review the form and set the review status to either Approved or Returned. The system sends an alert to Operator and generates an email with review status.

Submit and Review Annual Data

The External/internal users can report oil and gas production data to CalGEM on an Annual basis. The submission of the form creates a workflow for internal users to review the form. The system sends an alert to the Operator and generates an email with review status Approved or Returned or Denied.

Reconcile Production Data

The HQ Data Management Group generates a production report from WellSTAR, then reconciles and attempts to resolve discrepancies with the operator. WellSTAR allows internal users to confirm annual production values submitted by Operators and reconcile those values with totals of monthly reported values. The CalGEM user determines assessable volumes of oil and gas for each Operator through this form, but does not affect actual reported volumes in the database. The external user submits monthly and annual production data, then WellSTAR creates a task for the internal user to review and submit a Reconcile Production form.

Submit Assessment Control Report

The system allows CalGEM users to apply the assessment rate determined by the Budget Office to all active Operators' assessable oil and gas volumes. Upon submission, the annual assessment fee and Notices of Assessment are created for all active operators in WellSTAR. The Assessment Control form is for internal users only and therefore has no review process. The internal user submits Assessment Control form and WellSTAR applies an Assessment rate to assessable volumes for each operator then determines the Total Assessment amount for each operator for the year. The system generates Assessment Fees automatically, but can be edited to accommodate statutory changes.

Monitor Data

The Monitor Data Process records Batch Jobs are scheduled to process the data. The batch job is a scheduled background program that usually runs on a regular basis without any user intervention and sends reminder email messages to Operators and does not depend on any processes. WellSTAR creates a task for the internal users to review missing data, then notifies Operators to correct and resubmit data.

Underground Injection Control (UIC)

The Underground Injection Control (UIC) workflow details the process where external users submit forms electronically and internal users on behalf of the external users. The external users can submit forms online and upload documents, then view their statuses when the forms are dispositioned internally.

The Business Processes for UIC are:

- Submit and Review New/Modify/Merge UIC Projects
- Submit and Review Water Sample Data Submission
- View UIC data

The submission of the 'Application for Injection Approval' online form generates CalGEM's internal review process of approving the form. WellSTAR creates the following tasks for internal users to complete the internal review process:

- Completeness Verification Task
- California Environmental Quality Act (CEQA) Verification Task
- Proposed Injector Verification Task
- Aquifer Exemption Verification Task
- Area of Review Verification Task
- District Verification Task
- CalGEM Headquarters (HQ) Verification Task
- Second CEQA Verification Task
- Outside Stakeholder Verification Task

When the form is not accepted, based on the 'Review Status' set by the internal user, WellSTAR sends an alert and email to the operator to notify that the form has been 'Returned' or put on 'Hold'. The system generates a Notice Correspondence to be send to external users. If project approved, WellSTAR generates Project Approval Letter and PAL Well List Appendix Letter. The UIC project status changes to 'Active', and WellSTAR sends an alert and email to the operator to notify that the form has been approved.

The Water Sample Data form can be submitted by external users, or by internal users on behalf of the external users. The submission of the Water Sample Data form creates the tasks for internal user to complete the internal review process. The Task is created for the District based on location of the Well or Facility from where the water sample is collected. WellSTAR generates an alert, an email, and a notification based on the status of the Internal review (Approved or Returned).

The Eternal and internal users have access to view and monitor the UIC Projects using Dashboard and export/print UIC data. The internal users can run reports to review UIC projects.

Well Management

There are few major processes in the Division's current Well Management workflow that occur today. The Well Management process details several sub-processes, each is unique but are linked and interdependent with each other.

The sub-processes include:

- Drill New Well/Rework/Redrill/Abandon
- Permit Information
- Update Well Information
- Additional Information
- View Data
- Monitor Well Information

Drill New Well/Rework/Redrill/Abandon Well (NOI) - Notice of Intention

This business process describes the submission of the NOI online form including CalGEM's internal review process of approving the form.

The NOI online form is used by external users or internal users submitting on behalf of external users to apply for one of the following:

- Drill New well
- Rework an existing well
- Redrill an existing well
- File for abandoning well
- Refile
- Supplement an existing permit

The system displays errors if the required fields are not populated, or the business rules are not met till Internal/external users correct errors and submits/resubmit the form. Also, WellSTAR creates the following tasks for internal users to complete the internal review process:

- Compliance
- District (completeness check)
- CEQA
- Underground injection control (UIC) (if associated to UIC project/application indicated on the form)
- Confidentiality (if confidentiality is requested on the form)
- Internal Review
- Final Review

WellSTAR determines if the operator is compliant by comparing the operator code to 'Operators Out of Compliance' list in the database then creates an Internal Task for the District to review those operators who are out of compliance. The system generates an email to notify operators that the form has been returned and they are not meeting some requirements. When the NOI is not approved, WellSTAR determines the type of correspondence that can be send and generates an alert with email to notify operators that form has been denied.

Permit Information/Update Well Information (Well Summary)

The Well Summary online form is used by external users to enter well details of the actual work done during drilling new well/re-work/redrill/abandon well and permit process. WellSTAR creates the following tasks for the internal users to complete the review process:

- Internal Review
- Final Review

On approval of the Well Summary online form, WellSTAR runs batch job to check for due dates of tests that are indicated on the Well Summary form. It sends an email to operators to remind them of upcoming tests.

The 'Well Summary' online form allows external users to make updates to well details or corrections to the initial 'Well Summary' form. This form can also be used by internal users to update well details based on site inspections, such as mark a well as Hazardous.

Additional Information

WellSTAR includes a process submission of several online forms including CalGEM's internal review process of approving the forms. external user can provide additional information regarding Well Data after the permit process such as:

- Updating Well Name
- Requesting confidentiality /extension of confidentiality of a well /appealing the decision of CalGEM
- Scheduling Test
- Uploading Test

The online forms can be submitted by external users or internal users on behalf of the external users. WellSTAR creates review task for internal user. The system sends an alert to Operator and generates an email with review status (accepted, returned, or approved).

The External/internal users can Schedule Test and Upload Test Results for internal users to review it. The internal users review test results and send out a review status notification to the operators.

View Well Data

The View Well Data process provides the view capability for both External and internal users regarding well details.

The Well details include information on:

- Production/Injection
- Tests
- Permits
- UIC
- Associated Facilities
- Ownership History
- Documents
- Events

Monitor Well Information

WellSTAR monitors Well data to systematically expire the permits of those operators who have not provided 'Well Summary' form. Also, it checks the pre-defined conditions (business rules) for submission of the 'Well Summary' form and those who do not meet the criteria, WellSTAR automatically expires the permits. The internal users monitor expired permits list and notify Operators.

WellSTAR for Operators

External functionality is being implemented in release 1 for the bond and entity management processes. Operators will now manage bond and entity information in WellSTAR.

Specific functionality addressed in this area:

1. Login External User
2. Create Individual or User
3. Create Organization
4. Modify Entity
5. Modify Role
6. Create Bond
7. Modify Bond

WellSTAR Alternate Procedures

The following are known defects being implemented and the associated alternate procedures for WellSTAR Release 2.0. These defects are being prioritized by the primary CalGEM stakeholders and fixes will be implemented based on the priority set by the business.

[R2.0_WellSTAR_Alternate_Procedures](#)