



## Transfer Management Quick Reference Guide

- **Submit Transfer**
- **Review 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.

## Review Transfer

**WellSTAR creates tasks for HQ Bond Administration Workgroup and District Transfers Workgroup when the operator(s) have filled out the Transfer Asset Form online.**

1. Navigate to the Transfer form via the workflow task by selecting the Task name.
  - a. WellSTAR displays the Transfer form. On Task Detail page, click Edit and Assign to yourself. Save.
2. Review the Transfer details by clicking on the 'Transfer Assets' link to review form. A new window opens.
  - a. For bond review, search for the bond to associate. WellSTAR displays the search results.
    - i. If no bond exists, you will need to go to "Create and Review Bond" process.
  - b. Upload any supporting documentation.
  - c. In the Review box, select 'Actions' then 'Update Review Status' to Pass, Return, or On Hold.
  - d. Select Save and confirm status.

**NOTE:** Upon completion of the review statuses by both District and Bond Workgroups, WellSTAR creates the final review task for Transfer Final Reviewers Workgroup approval.

## Final Review of Transfer

1. From the home page, navigate to Tasks to retrieve the Final Determination of Transfer task in the Transfers Final Reviewer Workgroup.
  - a. WellSTAR displays the Transfer form. On Task Detail page, click Edit and Assign to yourself. Save.
2. Click on the 'Transfer Assets' link to review form. A new window opens.
  - a. Review the online form including attachments, comments, and the District and Bond Workgroup statuses.
3. Select 'Update Review Status'. WellSTAR will generate emails to the operators based on the status.
4. A Subtask can be created if you need to place the Transfer "On Hold" for any reason.
  - a. Select 'Create Sub Task'. A new window opens. Enter description and workgroup details. Save

## 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 |

| Transfers Key Benefit | Transfers Benefit Description  |
|-----------------------|--|
| Functionality Benefit | Operator submitted data integrated into the system automatically             |
| System Improvement    | Communication, transfer management, and bonds all in one searchable database |
| Transparency          | Audit trail and history of database interactions                             |
| User Benefit          | All data in one location   |

## Where Do I Get Help?



- **WellSTAR Online Help**
- **Training Workgroup**
- **Service Desk/ETSD Email - [ServiceDeskMail@conservation.ca.gov](mailto:ServiceDeskMail@conservation.ca.gov)**
- **Service Desk/ETSD - Phone (916) 327-6260**