



California  
**Department of  
Conservation**  
Geologic Energy Management



User Reference Guide  
Bulk Scheduling

## **Table of Contents**

<b>COURSE OVERVIEW .....</b>	<b>3</b>
COURSE DESCRIPTION .....	3
<b>1    <b>SUBMIT BULK SCHEDULING FORM.....</b></b>	<b>4</b>
1.1    NAVIGATING TO BULK SCHEDULING FORM .....	4
1.1.1 <i>Navigate to Bulk Scheduling Form from Online Forms Page.....</i>	4
1.1.2 <i>Navigate to Bulk Scheduling Form from Scheduler.....</i>	6
1.2    STEP 1. FORM INFORMATION.....	6
1.3    STEP 2. OPERATOR INFORMATION .....	9
1.4    STEP 3. DOWNLOAD THE EDD .....	11
1.4.1 <i>Schedule New Test(s)/Inspection(s).....</i>	12
1.4.2 <i>Update Existing Test(s)/Inspection(s) .....</i>	13
1.4.3 <i>Cancel Existing Test(s)/Inspection(s).....</i>	15
1.5    STEP 3. UPLOADING EDD .....	16
1.6    STEP 4. BULK SCHEDULING DETAILS .....	18
1.7    CORRECT WARNINGS AND CRITICAL ERRORS.....	20
1.7.1 <i>Warning Message and Critical Error Key Points.....</i>	27
1.8    STEP 5. SUBMIT THE FORM .....	28

## **COURSE OVERVIEW**

---

### **Course Description**

The Bulk Scheduling form allows Internal and External Users to schedule and maintain scheduled test and inspections. Multiple scheduled tests and inspections can be created and updated on a single Electronic Data Deliverable (EDD). Scheduled tests and inspections can be created, updated and canceled through the form. There are no review steps for this form, when the user submits the form, an alert is sent to the dispatching workgroup, and WellSTAR is updated.

Only one Bulk Scheduling form should be open per Operator per District at a time, to ensure the changes made will not be overwritten by a subsequently submitted form.

## 1 SUBMIT BULK SCHEDULING FORM

---

Generate the bulk scheduling form to create, update, and cancel scheduled tests or inspections.

### 1.1 Navigating to Bulk Scheduling Form

There are multiple ways to navigate to and launch the Bulk Scheduling form. Two of the most common methods explained below. Only one of the following options is required to launch the form.

#### 1.1.1 Navigate to Bulk Scheduling Form from Online Forms Page

Figure 1: Navigation to Online Forms Page illustrates the Home menu with the Forms menu item highlighted and the Online Forms submenu selected.

Figure 1: Navigation to Online Forms Page

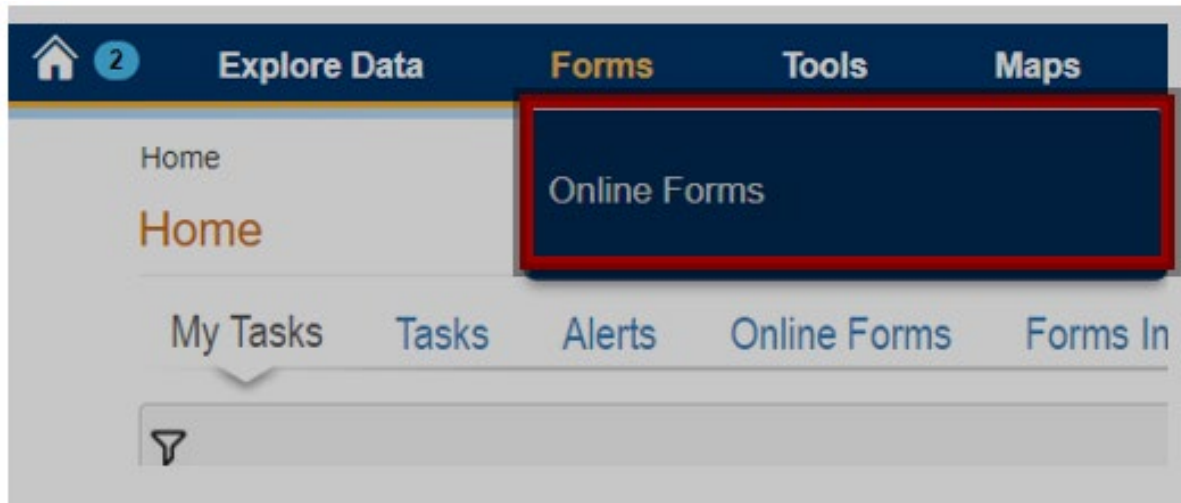


Table 1: Online Forms Page Instructions

Step	Action	Required Fields
1	From the Home screen click <b>Online Forms</b> .	
2	Click on <b>Online Forms</b> .	

## Bulk Scheduling

Figure 2: Online Forms Screen Snapshot illustrates Online Forms screen that illustrates:

- Highlights the Advanced Filtering command indicated by the filter icon
- Illustrates filter criteria that includes Form Name, Form Category, Purpose, Version and Count
- Illustrates sample search criteria of "bulk" and search results of "bulk scheduling"

Figure 2: Online Forms Screen Snapshot

The screenshot shows the 'Online Forms' interface. At the top, there are navigation tabs: Home, My Tasks, Tasks, Alerts, Online Forms (selected), Forms In Progress, and Forms Submitted. A 'Help' button is in the top right. Below the tabs is a search bar with a search icon and a search input field. A dropdown menu labeled 'Advanced Filtering' is open, showing filter criteria: Form Name, Form Category, Purpose, Version, and Count. The 'Form Name' filter is set to 'bulk'. Below the filter criteria is a table with one row of results. The first row is highlighted with a red box and contains the text 'Bulk Scheduling'. The table has columns for Form Name, Form Category, Purpose, Version, and Count. The 'Form Name' column contains 'Bulk Scheduling', 'Form Category' contains 'Test', 'Purpose' contains 'Bulk Schedule Tests for Facility Components and Wells and/or Schedule Inspections for Facilities, Components, Wells, Leases, and Projects.', 'Version' contains '1', and 'Count' contains '1'. At the bottom of the screen, there is a pagination bar showing '1' items per page and 'Viewing 1 - 1 from 1 results'.

Table 2: Advanced Filtering Instructions

Step	Action	Required Fields
1	Click on <b>Advanced Filtering</b> to refine your search.	
2	Filter by "Bulk".	
3	Click on the <b>Bulk Scheduling</b> form hyperlink to access the form.	

## Bulk Scheduling

### 1.1.2 Navigate to Bulk Scheduling Form from Scheduler

Figure 3: Scheduler Screen Snapshot illustrates:

- Actions command selected
- Available Actions displayed are Schedule New Event, Bulk Scheduling, Export – Excel, and Export – PDF

Figure 3: Scheduler Screen Snapshot

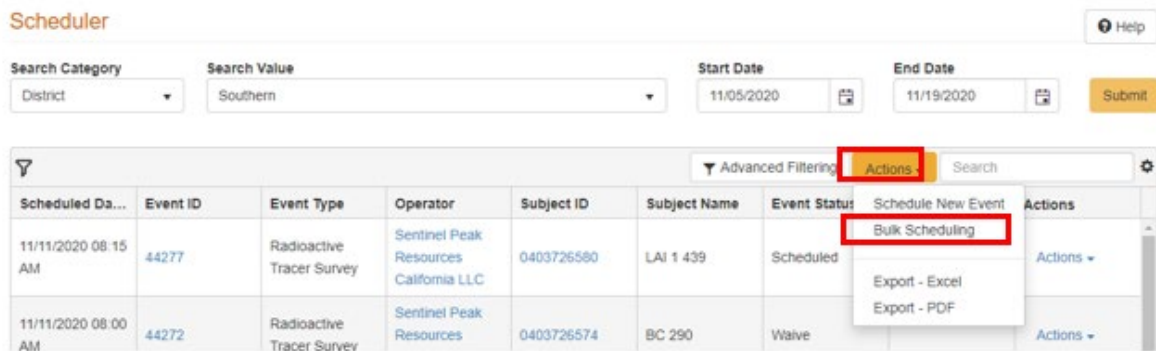


Table 3: Scheduler Screen Instructions

Step	Action	Required Fields
1	From the Home screen, select <b>Explore Data</b> and select <b>Scheduler</b> .	
2	From the Scheduler page click <b>Actions</b> .	
3	Click on <b>Bulk Scheduling</b> .	

## 1.2 Step 1. Form Information

Figure 4: Form Instruction Screen Snapshot indicates the required fields using a red star. The required fields are: Organization, District, and Description. The Form Information screen informs the user:

*Operators scheduling a text 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*

## Bulk Scheduling

*to schedule tests that are not compliant with UC or UGS scheduling and notification regulations may result in violations issued to the operator.*

Figure 4: Form Instruction Screen Snapshot also contains the contact information for each district.

Figure 4: Form Instruction Screen Snapshot

**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

Coastal District	
Orcutt	(805) 937-7246
Ventura	(805) 937-7246
Inland District	(661) 322-4031
Northern District	(916) 322-1110
Southern District	(562) 637-4400

**Form Name**  
Bulk Scheduling

**Organization \***  
Aera Energy LLC (A0610) - Bakersfield, CA

**District \***  
Coastal

**Description \*** ⓘ  
Rescheduling San Ardo RA Surveys to following week.

All comments are discoverable records, open to public review.

## Bulk Scheduling

Table 4: Form Information Instructions

Step	Action	Required Fields
1	As an external user, the <b>Organization</b> will be preselected for you and is uneditable. <b>Note:</b> the organization prepopulated is based on the organization selected when signing in. If you wish to fill this form for another organization you are affiliated with, you must log out and log back in under that organization.	Yes
2	Select the correct <b>District</b> . <b>Note:</b> this will limit the existing scheduled tests and inspections included in the EDD export to ones within the selected district.	Yes
3	Enter a relevant <b>Description</b> .	Yes



### 1.3 Step 2. Operator Information

Figure 5: Operator Information Screen Snapshot illustrates steps 1 through 4 described in the following table.

Figure 5: Operator Information Screen Snapshot

Lease Information - Vaquero Energy, Inc. (V0725) Help

Form ID: 132206

Form Navigation

- 1. Form Information
- 2. Operator Information**
- 3. Lease Information
- 4. Lease Associations
- 5. Document Upload
- 6. Form Submit
- 7. Confirmation
- 8. Review Comments
- 9. Review

#### Operator Information

Please enter information below. \* Indicates Required Field

**Organization Name**  
Vaquero Energy, Inc. (V0725)

**Type of Organization**  
Corporation

**Organization Primary Address**  
4700 Stockdale Highway  
Suite 120  
Bakersfield, CA 93309

**Organization Primary Phone Number**      **Ext**

Contacts 1

Name ↑	Phone Number	Email	Role	Actions
Stephen Cunningham	(661) 747-9631	scunningham@vaqueroenergy.comx	Agent	<span>2</span>
Victor Medrano	(661) 322-4031	victor.medrano@conservation.ca.govx	Submitter	

Advanced Filtering    Actions ▾

3 Add Contact

- Export - Excel
- Export - PDF

4 Add Contact ×

\* Indicates Required Field

Is this contact already in WellSTAR?

**Contact Role \*** 4

**Find Person \***

**Contact Name**

**Phone Number**

**Email**

5 Cancel Save

6 Back Next Save

## Bulk Scheduling

Table 5: Operator Information Instructions

Step	Action	Required Fields
1	Additional contacts can be added to this form.	
2	If a relevant person is not listed on the contacts list, click Actions.	
3	Click <b>Add Contact</b> .	
4	Complete <b>Add Contact</b> dialogue box that appears. <b>Note:</b> Can only add contact, if contact is already associated to the organization in WellSTAR. Note: The people added to the form contacts will receive an email when the form is accepted. Note: This does not replace field contact/dispatch notes in the EDD.	Contact Role, Find Person Contact Name, Phone Number, Email (if contact is not already in WellSTAR).
5	Click <b>Save</b> to add the contact and close the dialog box.	
6	Click <b>Next</b> .	

### 1.4 Step 3. Download the EDD

Figure 6: EDD Upload Screen Snapshot illustrates the Form Navigation screen with the EDD Upload option selected and the resulting EDD Upload screen. The steps related to this screen snapshot is described in the following table of steps.

Figure 6: EDD Upload Screen Snapshot

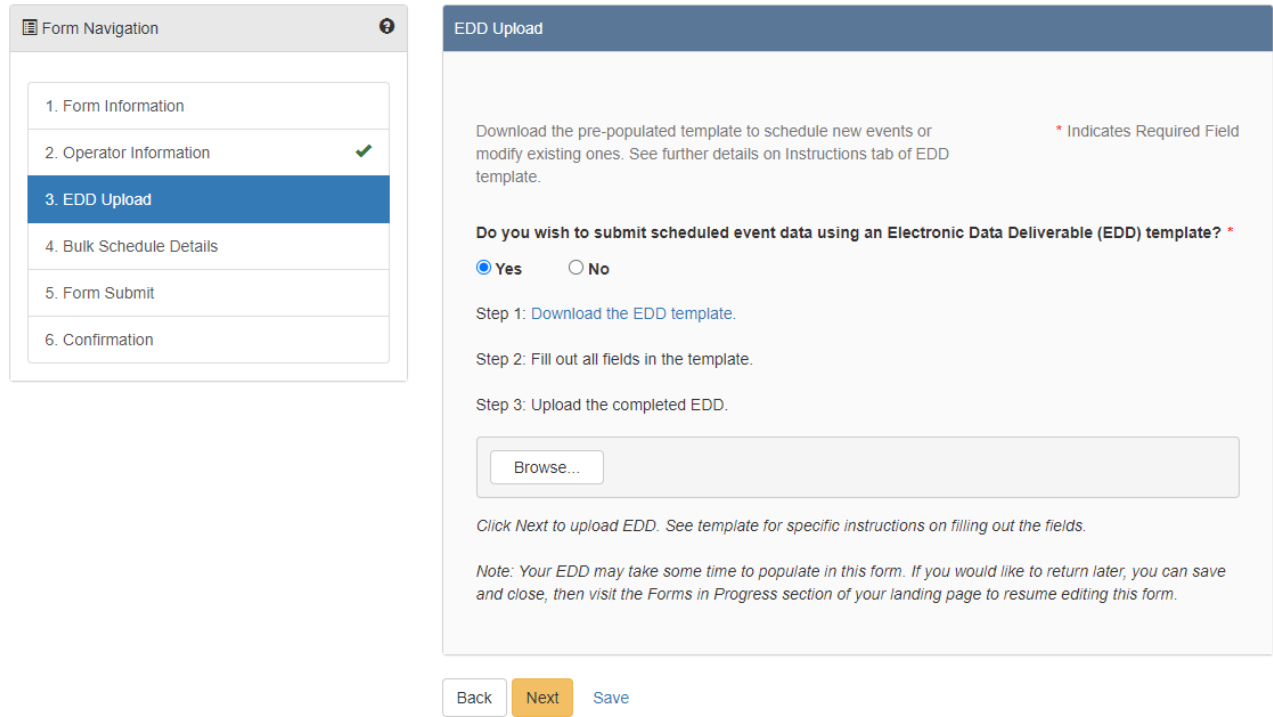


Table 6: EDD Upload Instructions

Step	Action	Required Fields
1	Click on <b>Yes</b> to download the EDD. Note: EDD should be downloaded each time to pull the most up to date data from WellSTAR.	
2	Click on <b>Download</b> the EDD template.	
3	Add or Edit test/inspection information in EDD.	
4	Save EDD.	

# Bulk Scheduling

## 1.4.1 EDD Key Points

- External users: The EDD will download all scheduled tests and inspections for the Operator 24 hours or more into the future.
- **DO NOT CHANGE THE FORMAT OF THE EDD. If the EDD formatting is altered, the EDD may not process.**

## 1.4.2 Schedule New Test(s)/Inspection(s)

Figure 7: Test/Inspection Spreadsheet illustrates

- the columns described in the following table
- the list of valid values for the Operation column which are: Update, New and Canceled

Figure 7: Test/Inspection Spreadsheet

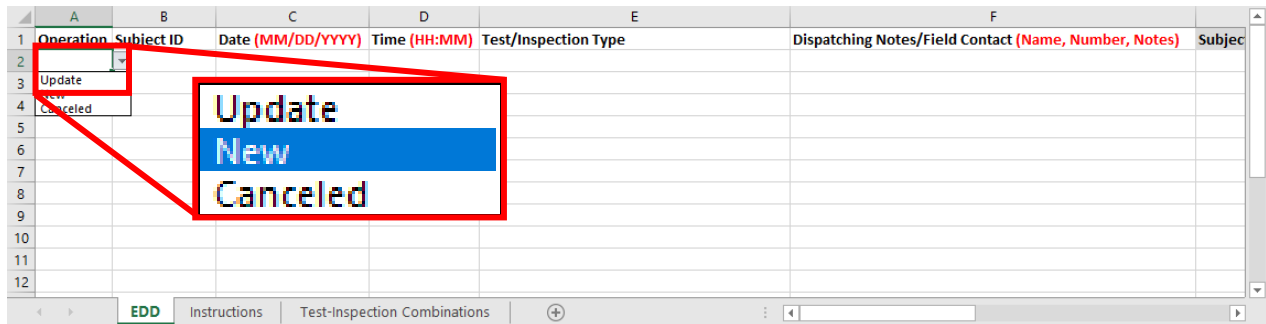


Table 7: Test/Inspection Spreadsheet Instructions

Step	Action	Required Fields
1	Select <b>New</b> in the Operations column.	Yes
2	Enter the Subject ID (API number, Facility ID, Lease ID, Component ID, UGS project code, or UIC project code).	Yes

Step	Action	Required Fields
3	Enter the Date, Time, and Test/Inspection Type <b>Note:</b> Once form is submitted, Subject ID and Test/Inspection Type cannot be changed. If a record is created for the incorrect subject or test/inspection type, the test/inspection should be canceled, and a new scheduled test or inspection be created.	Yes
4	Enter Dispatching Notes. <b>Note:</b> the dispatching notes can be used to provide a contact for that specific inspection or any other information CalGEM may need about that scheduled event. Please enter a contact name and phone number.	No, but preferred

#### 1.4.2.1 Key Points

- Test/Inspection Status, Priority, and Assigned Engineer, are all Internal Only fields (CalGEM staff only). This means that External changes to these columns will not be accepted by WellSTAR.
  - When scheduling new test(s)/inspection(s) external users will leave these columns blank (for new test(s)/inspection(s)).
  - When updating an existing future event, the external user will leave the data as it was prepopulated by the EDD.

#### 1.4.3 Update Existing Test(s)/Inspection(s)

Figure 8: Existing Test/Inspection Spreadsheet illustrates a spreadsheet with data populated.

## Bulk Scheduling

Figure 8: Existing Test/Inspection Spreadsheet

1	Operation	Subject ID	Date (MM/DD/YYYY)	Time (HH:MM)	Test/Inspection Type	Dispatching Notes/Field Contact (Name, Number, Notes)	Sul
2	Update	0403025108	10/14/2020	13:44	Cement Memo - Plug Tag	Tagging @ 1109' w/35 jts - 3' out, P = 1183', 139CF f/1661', tto Fin	
3	Update	0403001306	10/14/2020	14:08	Cement Memo - Plug Tag	Tagging @ 1026', P = 1202', 270CF f/1615' (120 CF f/1615' t/135'	
4	Update	02981178	10/16/2020	06:00	Radioactive Tracer Survey	Stan Beck (###) ### ####	Loc
5	Update	03044272	10/16/2020	08:00	Pressure Test - Casing Only	Hayden (###) ### ####	Bel
6	New	03044272	10/16/2020	08:00	Clean Out Tag	Troy with MMI (###) ### #### Tagging at 1254' with CTU	Bel
7	Canceled	0402977045	10/17/2022	08:00	Clean Out Tag	Tagging @ 1213', P = 1289', Perfs @ 1140-1220'; jeff(###) ###	625
8		0403044240	10/17/2022	08:00	Blowout Prevention Equipment Test	Tim Collom 805-937-7248	Re:
9		0403044272	10/17/2022	08:00	Radioactive Tracer Survey		Bel
10		0403044240	10/17/2022	08:00	Radioactive Tracer Survey		Re:
11		0403056012	10/17/2022	08:00	Well MIT - Other		55
12		0403025108	10/17/2022	08:00	Conditions of Approval Inspection	Steel plate; Zach (###) ### ####	Fin
13		0403056012	10/17/2022	11:45	CEQA Inspection	Pam King (###) ### ####	556
14		0403033386	10/15/2023	11:00	Cement Memo - Plug Tag	Tagging @ 721', P = 866', 120 CF f/1597', 5.5" 15.5#, Rich(###)	536
15		0403067534	03/03/2025	00:00	Well MIT - Other	MIT Part 1	Un

Table 8: Update Test/Inspection Spreadsheet Instructions

Step	Action	Required Fields
1	Select <b>Update</b> in the Operations column.	Yes
2	<p>Updates can be made to Date, Time, and Dispatching Notes/Field Contact.</p> <p><b>Note:</b> The updated must be used when changing any of the cells' data. Updates that do not have "Update" selected, will not be modified.</p> <p><b>Note:</b> an email will be sent to the assigned engineer informing them of the change to this scheduled test or inspection.</p>	

### 1.4.3.1 Key Points

- Test/Inspection Status, Priority, and Assigned Engineer, are all Internal Only fields. This means that External users cannot select nor change any of these columns.
- When scheduling new and/or updating existing test(s)/inspection(s) external users will leave these columns blank (for new test(s)/inspection(s)) or with the prepopulated data (for existing test(s)/inspection(s)).

### 1.4.4 Cancel Existing Test(s)/Inspection(s)

Figure 9: Cancel Test/Inspection Spreadsheet illustrates the selection of Canceled from the Operation pull down menu.

Figure 9: Cancel Test/Inspection Spreadsheet

Operation	Subject ID
Canceled	0403025108
Update	03001306
Update	02981178
New	
Canceled	03044272

Table 9: Cancel Test/Inspection Spreadsheet Instructions

Step	Action	Required Fields
1	<p>Select <b>Canceled</b> in the Operations column.</p> <p><b>Note:</b> NO further action is needed. A user does not need to update the test or inspection status. WellSTAR will automatically update the Test/Inspection Status to Canceled after the form has been submitted.</p>	Yes

## 1.5 Step 3. Uploading EDD

Figure 10: EDD Upload Screen illustrates these screen elements:

- Instructions: Download the pre-populated template to schedule new events or modify existing ones. See further details on instructions tab of EDD template
- User Prompt: Do you wish to submit scheduled event using an Electronic Data Deliverable (EDD) template?
- User Selection: Yes option selected
- Instructions:
  - Step 1: Download the EDD template
  - Step 2: Fill out all fields in the template
  - Step 3: Upload the completed EDD
- Instructions: Click Next to upload EDD. See template for specific instructions on filling out the fields.
- Note: Note: Your EDD may take some time to populate in this form. If you would like to return later, you can save and close, then visit the Forms in Progress section of your landing page to resume editing this form.



## Bulk Scheduling

Figure 10: EDD Upload Screen

### EDD Upload

Download the pre-populated template to schedule new events or modify existing ones. See further details on Instructions tab of EDD template. \* Indicates Required Field

**Do you wish to submit scheduled event data using an Electronic Data Deliverable (EDD) template? \***

**Yes**     **No**

Step 1: [Download the EDD template.](#)

Step 2: Fill out all fields in the template.

Step 3: Upload the completed EDD.

*Click Next to upload EDD. See template for specific instructions on filling out the fields.*

*Note: Your EDD may take some time to populate in this form. If you would like to return later, you can save and close, then visit the Forms in Progress section of your landing page to resume editing this form.*

Table 10: EDD Upload Instructions

Step	Action	Required Fields
1	Select <b>Browse</b> and select the EDD to upload by navigating through Windows Explorer.	Yes
2	Click <b>Next</b> to proceed with next step in form.	Yes

## **1.6 Step 4. Bulk Scheduling Details**

This step ensures the data uploaded through the EDD fits the expected format and requirements of WellSTAR. Any needed changes to the data in the grid below (illustrated in Figure 11: Bulk Schedule Details Screen ) will need to be made in the EDD, then the EDD will need to be re-uploaded.

# Bulk Scheduling

Figure 11: Bulk Schedule Details Screen

Form ID: 178043

The system is still processing an EDD for this form. The form will be read only until processing is complete.

Table 11: Bulk Schedule Details Instructions


Step	Action	Required Fields
1	<p>Click the refresh button for your browser until the yellow EDD processing message disappears and a green success message displays.</p> <p><b>Note:</b> By refreshing the grid and not the window, the processing banner will still appear. Users can continue to proceed.</p> <p><b>Note:</b> EDD processing message displays while upload is in progress.</p>	

## 1.7 Correct Warnings and Critical Errors

Figure 12:Correct Warnings & Error Grid illustrates:

- **Warning:** 3 of 8 processed records contain warnings. See grid below for further details.
- **Instructions:** Confirm scheduled test/inspection data. If errors exist they must be corrected in the EDD template and re-uploaded.

Figure 12:Correct Warnings & Error Grid

 3 of 8 processed records contain warnings. See grid below for further details.

Confirm scheduled test/inspection data. If errors exist they must be corrected in the EDD template and re-uploaded.

Subject ID	Date	Time	Test...	Sub...	Test...	Vali...	Message	Actions
0402981178	10/16/2020	06:00	Radio active Tracer Survey	Lockwood W52-16		⚠	Warning: The date entered for this test is in the past.	Actions▼
0403044272	10/16/2020	08:00	Pressure Test - Casing Only	Belridge V 8554A -2	Witness	⚠	Warning: The date entered for this test is in the past.	Actions▼
0403044272	10/17/2020	09:41	Clean Out Tag	Belridge V 8554A -2	Waive	⚠	Warning: The date entered for this test is in the past.	Actions▼
040297704	10/15/	10:00	Clean Out	625P-	Witness	✅		Actions▼

⏪ ⏩ 1 ⏪ ⏩
20 items per page
Viewing 1 - 8 from 8 results 🔄

## Bulk Scheduling

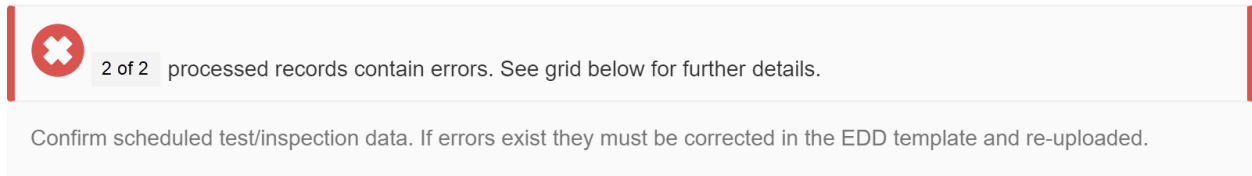
Table 12: Warning & Error Review Instructions

Step	Action	Required Fields
1	<p>Review table for any warning messages or critical errors.</p> <p><b>Note:</b> Bulk Scheduling form can be submitted with Warning Messages (yellow), these can be corrected as needed in the EDD and reuploaded.</p> <p><b>Note:</b> Bulk Scheduling form <b>cannot</b> be submitted with Critical Errors (red), these will need to be corrected in the EDD and reuploaded.</p>	

Figure 13: Error Dialog illustrates the error dialog displayed when errors are found during processing. This example illustrates:

- **Warning:** 2 of 2 processed records contains errors. See grid below for further details.
- **Instructions:** Confirm scheduled test/inspection data. If errors exist they must be corrected in the EDD template and re-uploaded.

Figure 13: Error Dialog



# Bulk Scheduling

Figure 14: Advanced Filtering Actions

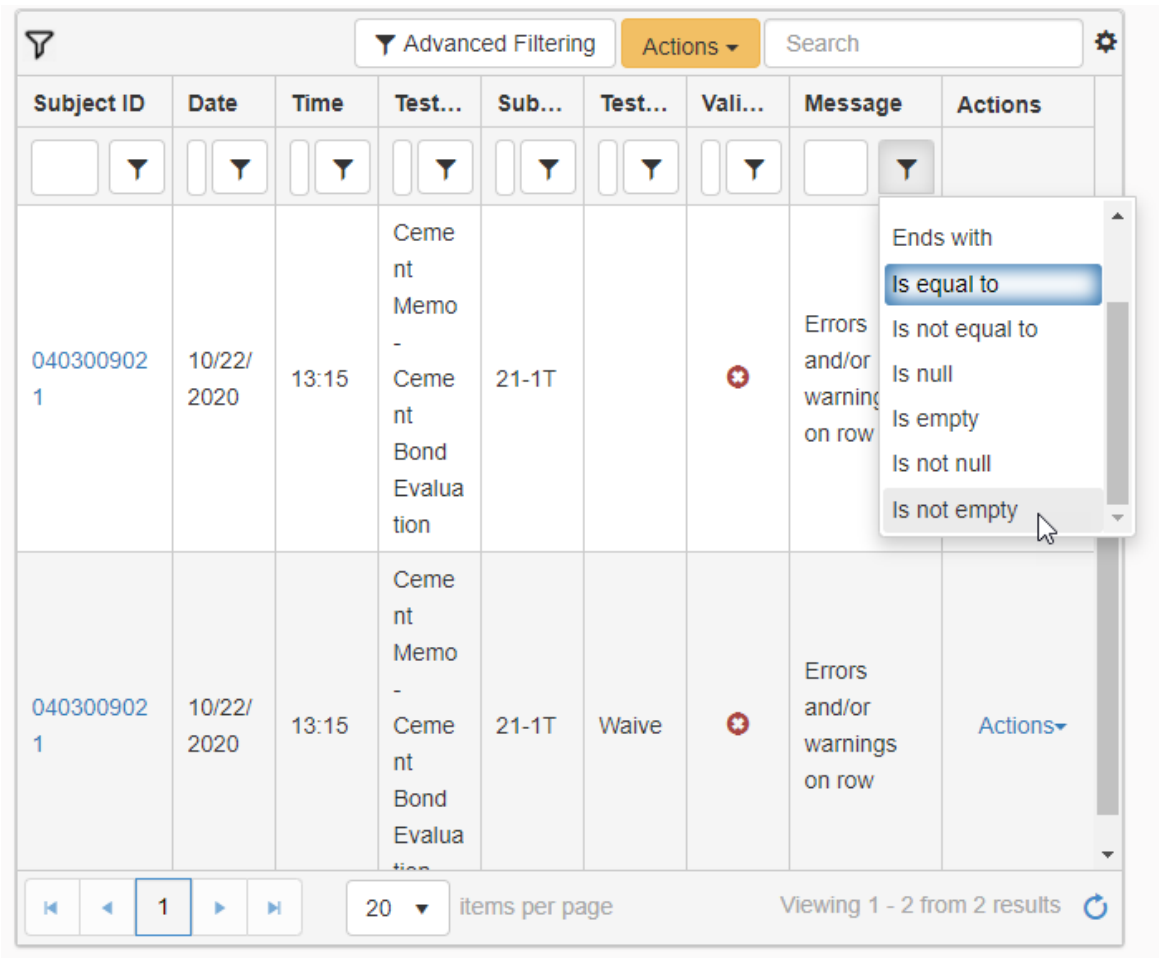


Table 13: Advanced Filtering Instructions

Step	Action	Required Fields
1	To filter the grid to easily view the errors, click <b>Advanced Filtering</b> and select the filter diagram in the Message column.	
2	Select Is not empty.	

# Bulk Scheduling

Figure 15: Advanced Filtering View Details Action

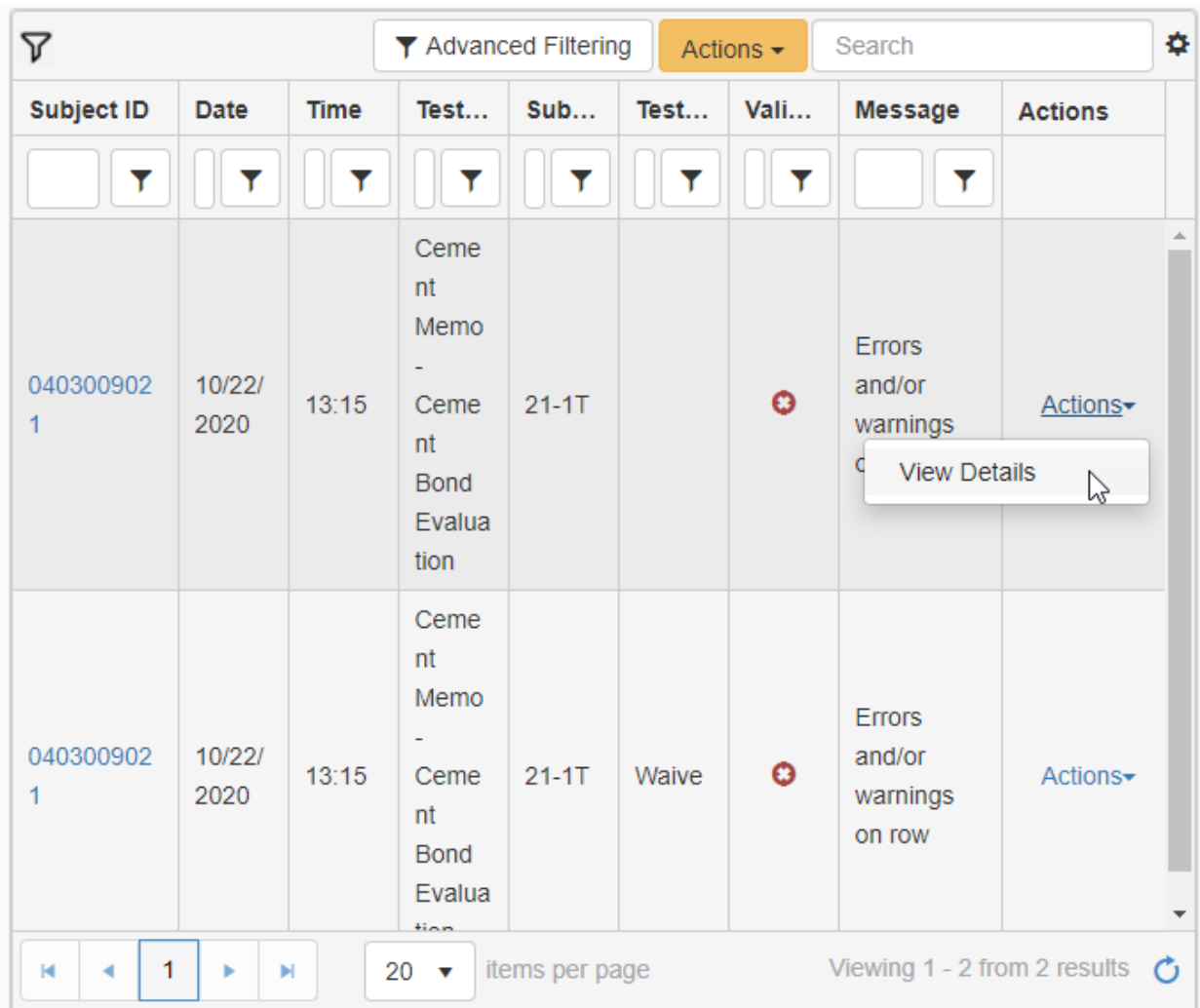


Table 14: Advanced Filtering View Details Instructions

Step	Action	Required Fields
1	To see additional information about the errors or warnings in a row, click <b>View Details</b> .	

# Bulk Scheduling

Figure 16: Event Details Screen

Event Details
✕

\* Indicates Required Field

Subject does not belong to selected Operator.  
A Test/Inspection already exists for 0403009021 with the same Date/Time/Type.

**Subject ID \***

**Date \***

**Time \***

**Test/Inspection Type \***

**Dispatching Notes/Field Contact**

Grant

**Subject Name**

**Subject Type**

**Subject Status**

**District**

**Field**

**Critical**

**Sensitive/Urban**

**Event ID**

**Test/Inspection Status**

**Priority**

**Assigned Engineer**

Table 15: Event Details Screen Instructions

Step	Action	Required Fields
1	View Event Details for errors. The grid and pop up are provided for informational and review purposes only. <b>All updates to the data must be completed in the EDD.</b>	




## Bulk Scheduling

Step	Action	Required Fields
2	<p>Open the edited EDD from previously saved location on your computer OR download the uploaded version from Step 3.</p> <p><b>Note:</b> The EDD pulls data from WellSTAR, if you re-download the EDD, it will not include the changes previously made in the EDD that was uploaded to this form. Only re-download the EDD if an unaltered copy is desired.</p>	
3	<p>Make correction(s) in EDD and reupload on Step 3 using the Browse button.</p>	

Figure 17: Bulk Schedule Details Feedback Dialog

Bulk Schedule Details [Hide Form Navigation]

 Your EDD was processed successfully. Click Next at the bottom of the screen to continue submitting your form.

Confirm scheduled test/inspection data. If errors exist they must be corrected in the EDD template and re-uploaded.

## Bulk Scheduling

Figure 18: Bulk Schedule Details Screen

Bulk Schedule Details
[Hide Form Navigation]

Confirm scheduled test/inspection data. If errors exist they must be corrected in the EDD template and re-uploaded.

Subject ID	Date	Time	Test/Inspection	Subject	Test/Inspection	Valid	Message
0403044240	10/17/2021	11:00	Prevention Equipment Test	Result 555N5-36	Witness	✔	
0403025108	10/15/2022	08:00	Conditions of Approval Inspection	Finley-Hausen-1386		✔	
0403056012	10/17/2022	11:45	CEQA Inspection	556Q2-1	Scheduled	✔	
0403033386	10/15/2023	11:00	Cement Memo - Plug Tag	538DHZ L-33	Witness	✔	

⏪ ⏩ 1 ⏪ ⏩

20 items per page

Viewing 1 - 8 from 8 results

Table 16: Bulk Schedule Details Instructions

Step	Action	Required Fields
1	Click the refresh button for your browser. <b>Note:</b> If refreshing the grid and not the browser window, the EDD processing banner will still appear when processing completes.	

## Bulk Scheduling

Step	Action	Required Fields
2	If there are no Critical Errors after the bulk schedule details are uploaded, click Next to proceed with next step in form. <b>Note:</b> The form may be submitted with yellow Warning Messages.	Yes

### 1.7.1 Warning Message and Critical Error Key Points

- Errors cannot be fixed in the Bulk Schedule details table, rather the values must be fixed in the EDD and resubmitted.
- Bulk Scheduling form can be submitted with yellow Warning Messages.
- Bulk Scheduling form cannot be submitted with red Critical Errors.
- The EDD download will always provide a copy of the current WellSTAR data.

## 1.8 Step 5. Submit the form

Figure 19: Acknowledgement & Form Submit Review Screen

**Acknowledgement**

**Submitter \***  
External User Jane Doe

**Date Received**  
08/19/2020

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

Table 17: Acknowledgement & Form Submit Instructions

Step	Action	Required Fields
1	Check the <b>Certify</b> box.	
2	Click <b>Submit</b> .	