



Railroad Commission of Texas State
Tracking and Reporting System (LoneSTAR)

Release 1 Software Design

User Guide

**W-3X Application for an Extension of Deadline
for Plugging a Well – Remove Extension**

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COURSE OVERVIEW

Course Description

This guide can be used to submit a W-3X Application for an Extension of Deadline for Plugging a Well form in LoneSTAR.

1.1 Launching the Form

1.1.1 Key Points

- Users with sufficient security roles can launch the form.

Home Hello Adam Bowerman, Railroad Commission of Texas

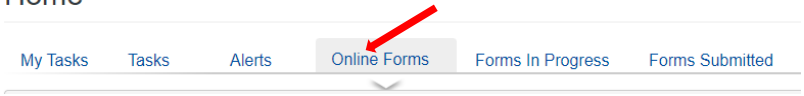
Home Help

My Tasks Tasks Alerts **Online Forms** Forms In Progress Forms Submitted

Form Name ↓	Form Number	Form Rules	Form Category	Purpose
W-3X Application for an Extension of Deadline for Plugging a Well	W-3X	W-3C & W-3X- Rule 3.15	Inactive Well	Request and approve a plugging extension related to one or more wells.
P-5 Organization Report	P-5, P-5O, P-5A	Rule 3.1	P-5	Apply to be a new P-5 organization, renew an existing P-5 organization, or update an existing P-5 organization record.
OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well	W3C	W-3C & W-3X- Rule 3.15	Inactive Well	Certify the removal of surface equipment for inactive wells in order to be compliant with Statewide Rule 15.
Financial Assurance Release	N/A	Rule 3.78	Financial Management	Request the release of financial assurance.
Financial Assurance Information	P-5LC, P-5PB(1), P-5PB(2), CF-1, CF-2	Rule 3.78	Financial Management	Enter information regarding an organization's financial assurance.

20 items per page Viewing 1 - 5 from 5 results

1.1.2 Steps to launch the form

Step	Action	Required Fields
1.	Navigate to the Internal Landing page.	
2.	Click the Online Forms tab. Home 	
3.	Select the W-3X Application for an Extension of Deadline for Plugging a Well form name.	

1.2 Form Information Step

1.2.1 Key Points

- Learn how to enter information on the form information step and create a new form instance.

Form Detail Navigation

Form information

* Indicates required field

Form Name
W-3X Application for an Extension of Deadline for Plugging an Inactive Well

Organization *

Purpose for Filing *

Blanket Extension Individual Extension Remove Extension Estimated Plugging Cost Update

Hard Copy Submission?

Description *

Cancel Save & Continue

1.2.2 Steps to complete the Form Information step

Step	Action	Required Fields
1.	Select the Organization you are submitting the W-3X on behalf of. Form Name W-3X Application for an Extension of Deadline for Plugging an Inactive Well Organization * <input type="text" value="ENR OPERATING, LLC (253075)"/>	
2.	Select the purpose of the W-3X being submitted. For this example, select Remove Extension. Purpose for Filing * <input type="radio"/> Blanket Extension <input type="radio"/> Individual Extension <input checked="" type="radio"/> Remove Extension <input type="radio"/> Estimated Plugging Cost Update Note: Each W-3X can only have one Purpose for Filing.	
3.	Do not select the Hard Copy Submission? Checkbox. Hard Copy Submission? <input type="checkbox"/> Note: The purpose of this is to indicate an Operator sent a W-3X to the commission and the Internal User is now submitting the form on behalf of the Operator.	
4.	Enter a Description that will allow you to easily locate this particular form submission in the future. Description *	
5.	Click Save & Continue <input type="button" value="Cancel"/> <input type="button" value="Save & Continue"/> Note: At this point, this is now considered a form instance in LoneSTAR	

1.3 Organization Information Step

1.3.1 Key Points

- Learn how to confirm Organization Information.

1.3.2 Steps to complete the Organization Information step

Step	Action	Required Fields								
1.	LoneSTAR will present the Organization Information step pre-populated with information based on the most recently approved P-5 Organization Report for the associated to Organization.									
2.	The first information presented includes the information for the organization itself as entered on the P-5 Organization Report. <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Organization Information</p> <p>Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the form submitter is selected as a contact. * Indicates required field</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Organization Long Name ENR OPERATING, LLC</td> <td style="width: 50%;">Type of Organization Limited Liability Company (LLC or LC)</td> </tr> <tr> <td>Organization Short Name ENR OPERATING, LLC</td> <td>RRC Operator Number 253075</td> </tr> <tr> <td colspan="2">Organization Primary Address 5445 LEGACY DR STE 440 PLANO, Texas 75024</td> </tr> <tr> <td>Organization Primary Phone Number (214) 526-8600</td> <td>Ext</td> </tr> </table> </div>	Organization Long Name ENR OPERATING, LLC	Type of Organization Limited Liability Company (LLC or LC)	Organization Short Name ENR OPERATING, LLC	RRC Operator Number 253075	Organization Primary Address 5445 LEGACY DR STE 440 PLANO, Texas 75024		Organization Primary Phone Number (214) 526-8600	Ext	
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Organization Primary Address 5445 LEGACY DR STE 440 PLANO, Texas 75024										
Organization Primary Phone Number (214) 526-8600	Ext									
3.	Below, the grid displays users who are associated to the form submission.									

	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Contacts</p> <div style="text-align: right;"> Advanced Filtering Actions </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Name ↑</th> <th style="width: 25%;">Phone Number</th> <th style="width: 25%;">Email</th> <th style="width: 25%;">Role</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td>Weston Cassidy</td> <td></td> <td>Weston.Cassady@fakedomain.com</td> <td>Submitter</td> <td></td> </tr> </tbody> </table> <p>Note: A user with a Role of Submitter is automatically added as the user who is currently in context of the online form.</p> </div>	Name ↑	Phone Number	Email	Role	Actions	Weston Cassidy		Weston.Cassady@fakedomain.com	Submitter		
Name ↑	Phone Number	Email	Role	Actions								
Weston Cassidy		Weston.Cassady@fakedomain.com	Submitter									
4.	<p>To navigate to the next step, click “Next”.</p> <div style="display: flex; gap: 10px; margin-top: 10px;"> Back Next Save </div>											

1.4 Well Selection and Disposition Step

1.4.1 Key Points

- Learn to select the well(s) to remove extension(s) from.

Form Information Organization Information Well Selection & Disposition Document Upload Fees & Payment Submission Review

Form Detail Navigation

- Form Information ✓
- Organization Information ✓
- Well Selection & Disposition
- Document Upload
- Fees & Payment
- Submission
- Review

Well Selection & Disposition

Please select one or more wells to update W-3X Extension Status below * Indicates required field

Associated Well Grid

Advanced Filtering Actions Search

API Number ↑	District Number	Estimated Pluggin...	W-3X Status	Oil Lease/Gas ID ...	Required for Rene...	Actions
00130090	06	\$33,703.00	Approved		Y	Actions
00132265	06	\$88,895.00	Approved		Y	Actions
00903799	09	\$18,848.00	Approved		Y	Actions
00903800	09	\$18,800.00	Approved		Y	Actions
00903805	09	\$18,756.00	Approved		Y	Actions
00903811	09	\$18,852.00	Approved		Y	Actions
00903813	09	\$19,010.00	Approved		Y	Actions
00903814	09	\$18,975.00	Approved		Y	Actions
00903853	09	\$18,852.00	Approved		Y	Actions

1 2 3 20 items per page
Viewing 1 - 20 from 50 results

Back Next Save

1.4.2 Steps to complete the Wells step

Step	Action	Required Fields
1.	This step will display with a list of wells associated to the organization associated to the online form instance.	

Associated Well Grid

Advanced Filtering Actions Search

API Number ↑	District Number	Estimated Pluggin...	W-3X Status	Oil Lease/Gas ID ...	Required for Rene...	Actions
00130090	06	\$33,703.00	Approved		Y	Actions-
00132265	06	\$88,895.00	Approved		Y	Actions-
00903799	09	\$18,848.00	Approved		Y	Actions-
00903800	09	\$18,800.00	Approved		Y	Actions-
00903805	09	\$18,756.00	Approved		Y	Actions-
00903811	09	\$18,852.00	Approved		Y	Actions-
00903813	09	\$19,010.00	Approved		Y	Actions-
00903814	09	\$18,975.00	Approved		Y	Actions-
00903853	09	\$18,852.00	Approved		Y	Actions-

1 2 3 20 items per page Viewing 1 - 20 from 50 results

2. To select a well to update its status, select the row-level actions menu. Doing so will display the Remove W-3X Extension modal.

Advanced Filtering Actions Search

API Number ↑	District Number	Estimated Pluggin...	W-3X Status	Oil Lease/Gas ID ...	Required for Rene...	Actions
00130090	06	\$33,703.00	Approved		Y	Actions-
00132265	06	\$88,895.00	Approved		Y	Remove W-3X Extension

3. In order to remove the W-3X Extension from the selected well, select the associated checkbox in the modal and press save.

Remove W-3X Extension

* Indicates required field

Well API

00130090

By selecting this checkbox, I indicate that RRC has determined that the previously approved W-3X Extension associated with this well will be removed.

Cancel
Save

Note: The W-3X Extension will not be removed until the form is approved.

4. Continue the previous steps for any additional wells that need to have their W-3X Extension removed.

5. To navigate to the next step, click "Next".

Back

Next


Save

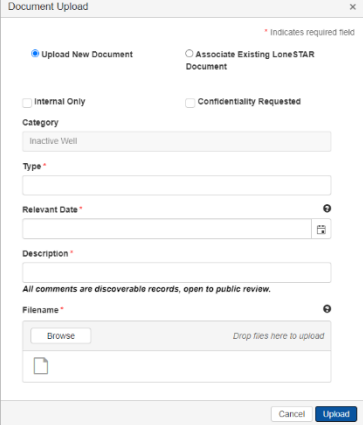
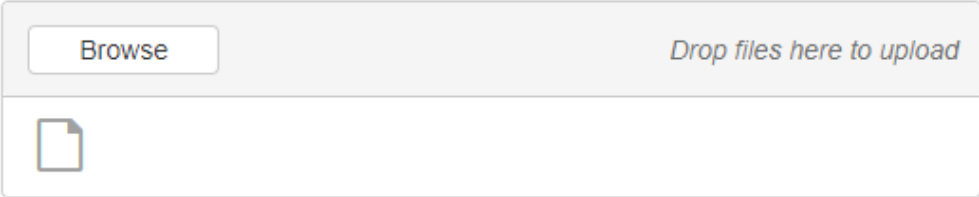
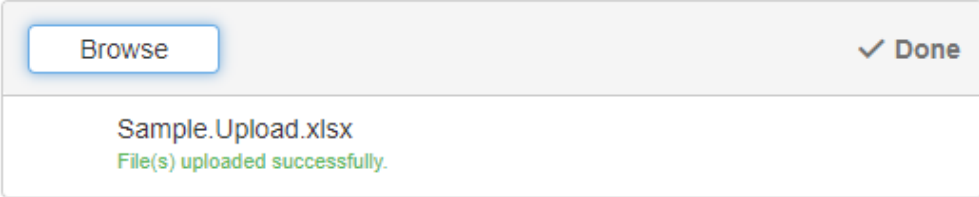

1.5 Document Upload Step

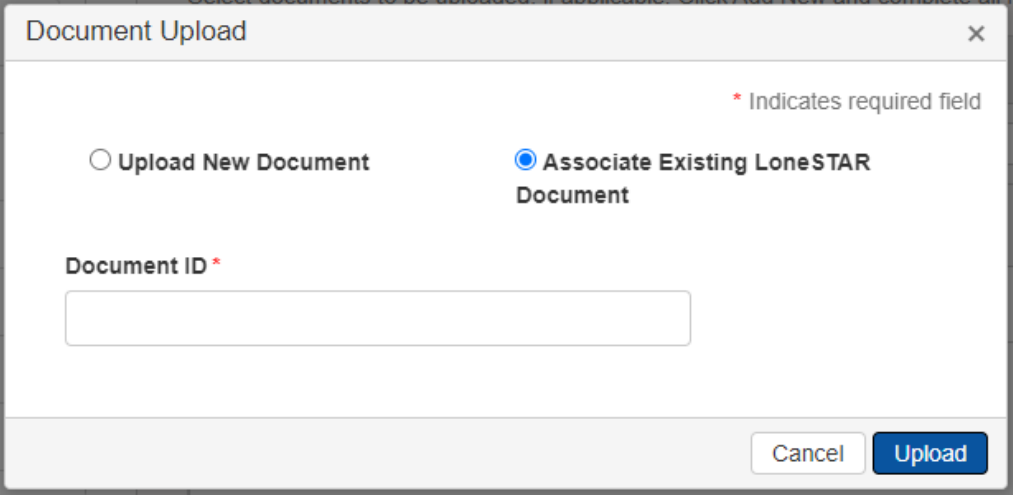

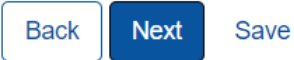
1.5.1 Key Points

- Learn how to upload various documents to be part of the online form submission.

1.5.2 Steps to complete the Document Upload step

Step	Action	Required Fields
1.	To upload a new document, click the grid-level actions menu and select to Add New. 	
2.	You will be presented with the Document Upload dialog.	

		
3.	<p>The user can choose to upload a new document or associate an existing document.</p> <p><input checked="" type="radio"/> Upload New Document <input type="radio"/> Associate Existing LoneSTAR Document</p> <p>Note: To associate an existing document, the document must have been uploaded as part of a previously approved form associated to the organization in context.</p>	
4.	<p>If you choose to upload a new document, you must select the type of document to be associated to the document. For this example, select a type of “Other” set the relevant date to today, and enter a description which can be easily identified later.</p>	
5.	<p>To upload the document itself, select the Browse button. You will be presented with your file management window to select the document from.</p> <p>Filename * ?</p> 	
6.	<p>Double click the document you would like to upload and the selected document will display in the Document Upload dialog.</p>	
7.	<p>LoneSTAR will display a message indicating the document was successfully uploaded.</p> <p>Filename * ?</p> 	
8.	<p>Select Upload and the document will now display in the grid and will be associated to the form submission.</p> 	
9.	<p>If instead of uploading a new document, an existing document can be associated.</p>	

	 <p>The dialog box is titled "Document Upload" and has a close button (X) in the top right corner. It contains two radio buttons: "Upload New Document" (unselected) and "Associate Existing LoneSTAR Document" (selected). Below the radio buttons is a text input field labeled "Document ID *". At the bottom right, there are two buttons: "Cancel" and "Upload". A legend indicates that an asterisk (*) denotes a required field.</p>	
10.	<p>The Document ID dropdown will display a list of documents that can be associated. Select the desired document and click Upload and the document will now display in the grid and will be associated to the form submission.</p> 	
11.	<p>To navigate to the next step, click "Next".</p> 	

1.6 Fees and Payment

1.6.1 Key Points

- Learn how to complete the Fees & Payments Step.
- Learn how to return to LoneSTAR after interacting with the Payment Portal.

Form Information Organization Information Well Selection & Disposition Document Upload **Fees & Payment** Submission Review

Form Detail Navigation

- Form Information ✓
- Organization Information ✓
- Well Selection & Disposition ✓
- Document Upload ✓
- Fees & Payment**
- Fees & Payments
- Submission
- Review

Fees & Payments


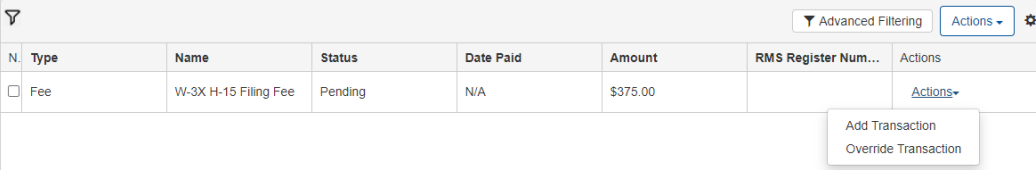

Displayed below are current fees and payments for this Organization. You are not required to pay all pending fees. Please note that a payment processing fee will be assessed for each separate electronic payment.

N	Type	Name	Status	Date Paid	Amount	RMS Register Num...	Actions
1	Fee	W-3X H-15 Filing Fee	Pending	N/A	\$1.00		Actions

Viewing 1 - 1 from 1 results

Back Next Save

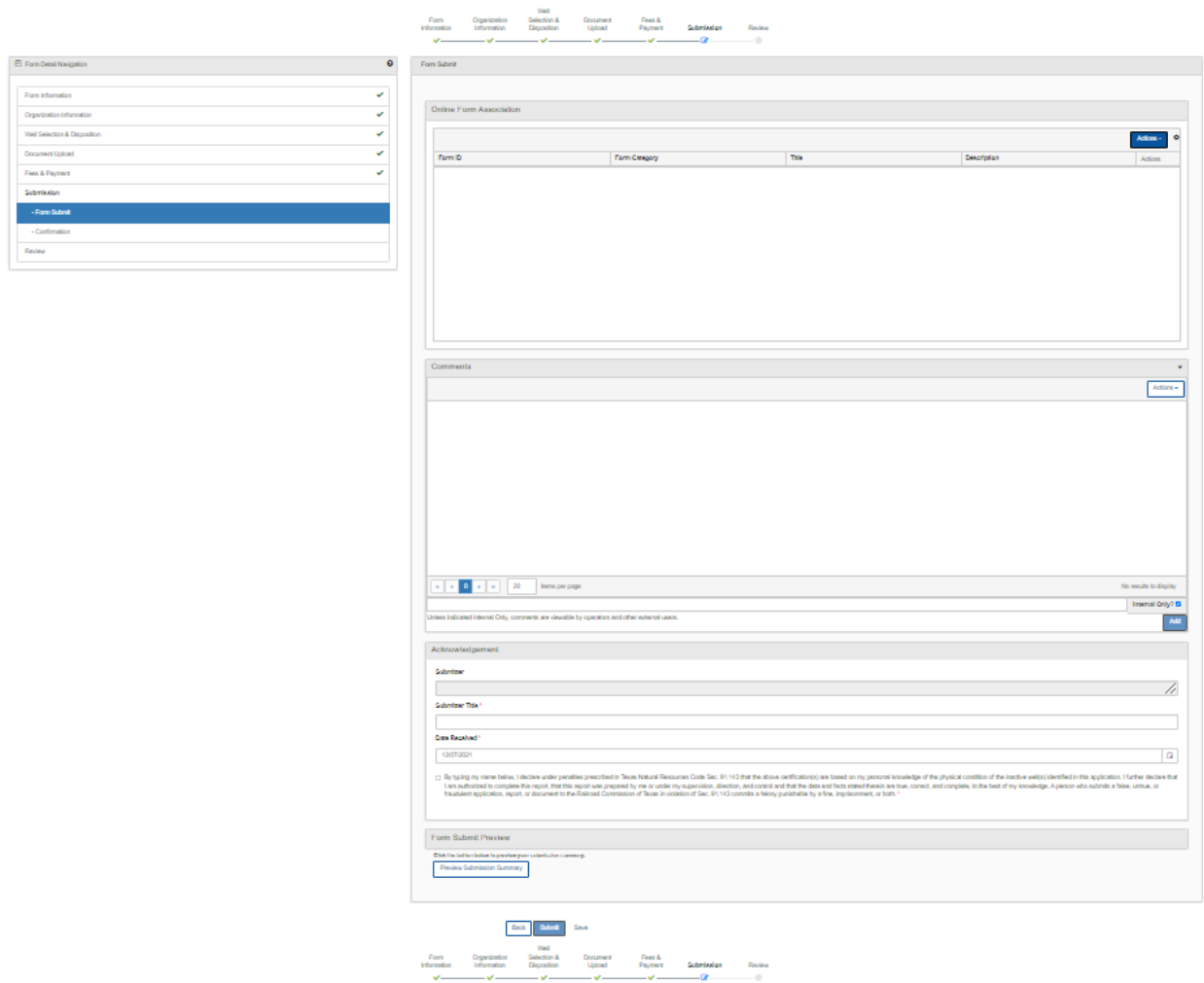
1.6.2 Steps to complete the Fees and Payment step

Step	Action	Required Fields
1.	LoneSTAR will present the user with a grid displaying any required Fees that must be submitted prior to submitting the form.	
2.	<p>In order to make a payment for any required fees, select the row-level actions menu and select “Pay Fee Electronically”.</p>  <p>Note: After selecting this, you will be brought to the Payment Portal. Once you have completed paying for the required fees, select the Return to LoneSTAR link.</p>	
3.	You can verify the status of the payment(s) in the “Status” column to see if the full payment was received by LoneSTAR.	
4.	Additionally, when a fee has a payment made for it, the “Payment Date” column will be populated with the day the fee was paid.	
5.	<p>Internal Users with sufficient security access can select the row-level actions and override the fee so no payment is necessary or can select the row-level actions and add a transaction manually to indicate a payment for the fee.</p> 	
6.	The above steps are replicable for all fees in the grid.	
7.	<p>To navigate to the next step, click “Next”.</p> 	


1.7 Form Submit and Confirmation Steps

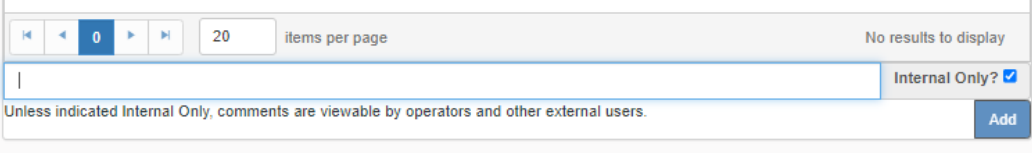
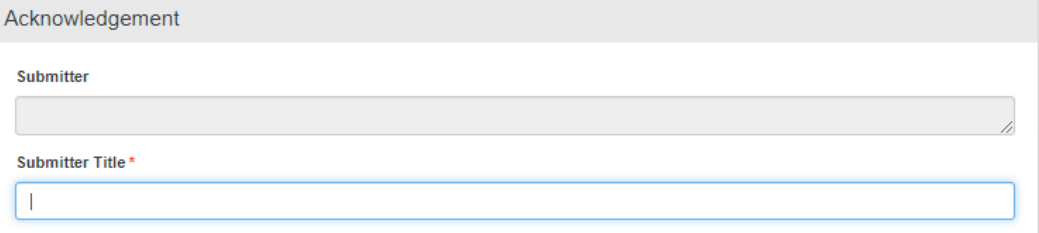
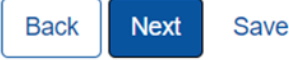
1.7.1 Key Points

- Learn how to submit the form.
- Learn how to view confirmation message.



1.7.2 Steps to complete the Form Submit step

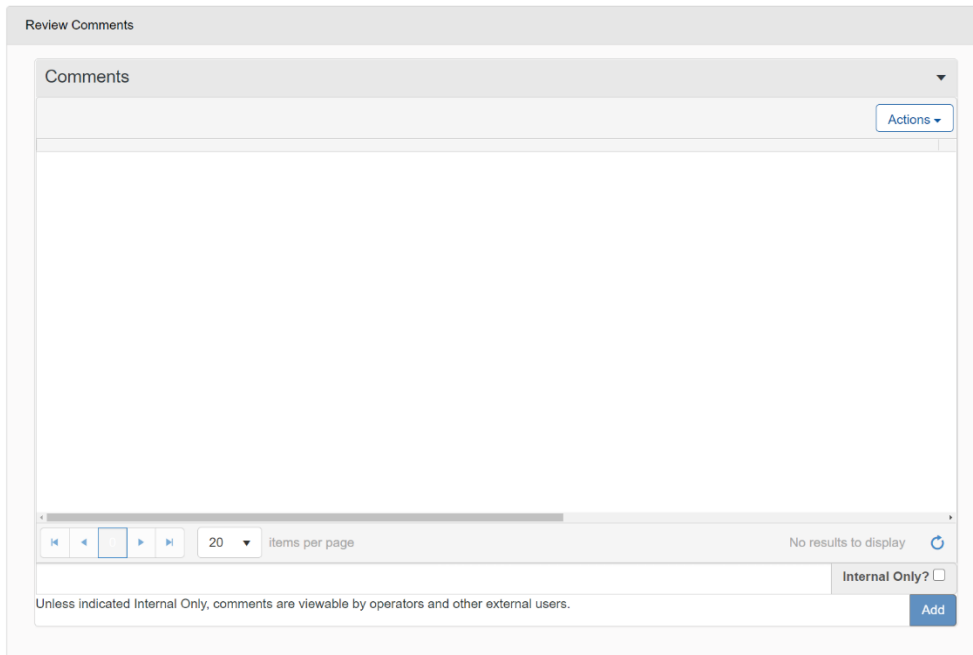
Step	Action	Required Fields
1.	To associate an existing online form to be part of this form submission, you can select the Add Form action and select the form from the subsequent dialog. 	
2.	To add a comment, enter the text of the comment in the comment textbox and press the Add button.	

		
3.	<p>In the Acknowledgement section, the user must enter their submitter title and indicate the date this form was received.</p> 	Submitter Title, Date Received
4.	<p>Select the certification checkbox.</p> <p><input checked="" type="checkbox"/> By typing my name below, I declare under penalties prescribed in Texas Natural Resources Code Sec. 91.143 that the above certification(s) are based on my personal knowledge of the physical condition of the inactive well(s) identified in this application. I further declare that I am authorized to complete this report, that this report was prepared by me or under my supervision, direction, and control and that the data and facts stated therein are true, correct, and complete, to the best of my knowledge. A person who submits a false, untrue, or fraudulent application, report, or document to the Railroad Commission of Texas in violation of Sec. 91.143 commits a felony punishable by a fine, imprisonment, or both. *</p>	Certification Checkbox
5.	<p>Select the Submit button to submit the form.</p>  <p>Note: The Submit button is deactivated until all required fields are completed on this step.</p>	
6.	<p>NEED SCREENSHOT</p> <p>When the form is submitted, the Confirmation message will be displayed to indicate the form has been submitted and the workflow processing has begun.</p> <p>Note:</p> <ul style="list-style-type: none"> • Refreshing the page will display if the workflow processing has been completed. • Once the form has been submitted, External Users can no longer edit the form. 	

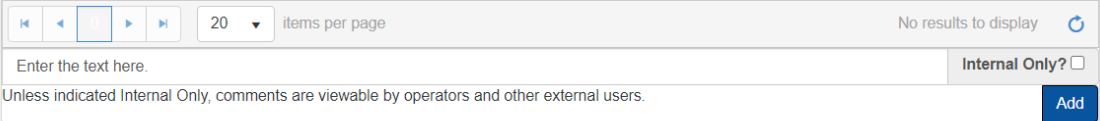

1.8 Review Comments Step

1.8.1 Key Points

- Learn how to complete the Review Comments Step.



1.8.2 Steps to complete the Review Comments step

Step	Action	Required Fields
1.	<p>To add a comment, enter the text of the comment in the comment textbox, select Internal Only? checkbox, and press the Add button.</p> <p>Note:</p> <ul style="list-style-type: none"> • Internal Only comments will only be viewable by Internal Users. • The Internal Only? checkbox selection persists between entering comments. 	
2.	<p>To add an externally facing comment, enter the text of the comment in the comment textbox, deselect the Internal Only? checkbox, and press the Add button.</p>	
3.	<p>Select the Next button to proceed to the next step.</p> 	

1.9 Review Step

1.9.1 Key Points

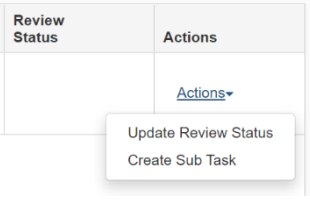
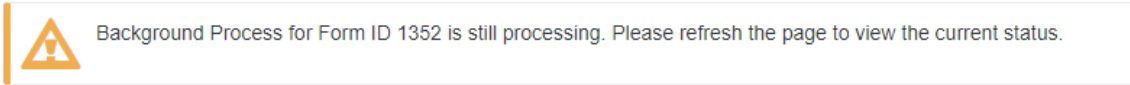
- Learn how to complete the Review Step.

Review						
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
Review Financial Assurance Information	P-5 Workgroup		03/09/2021 09:17 AM	03/09/2021 09:17 AM		Actions ▼

10 items per page
 Viewing 1 - 1 from 1 results

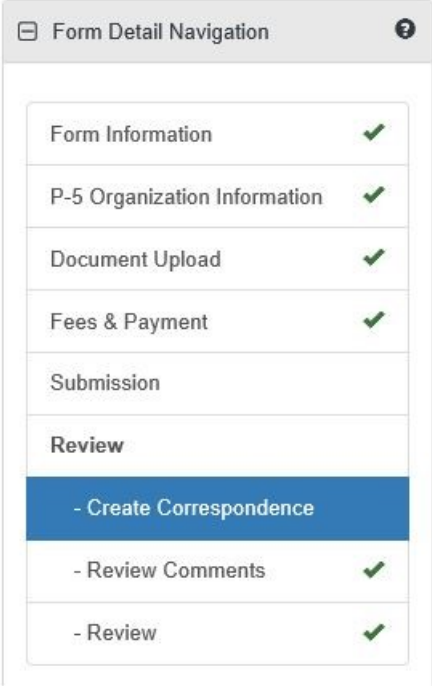
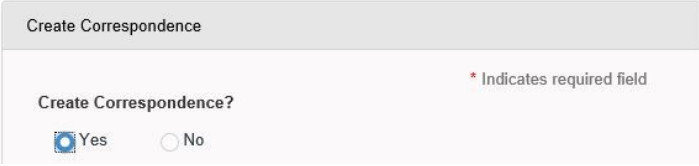
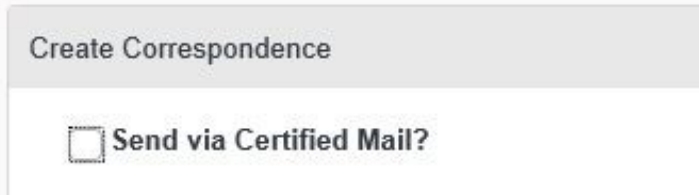
1.9.2 Steps to complete the Review step


1.	The step is pre-populated with a review task to be completed.	
2.	Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.	


3.	<p>To assign the task to yourself, select the Edit button and in the Assigned To dropdown, select your name from the list, set a Due Date, and select Save.</p> <p>Assigned To</p> <p>Nicholas Bennett</p> <p>Due Date *</p> <p>02/10/2021</p> <p>Created Date</p> <p>02/09/2021</p> <p>Created By</p> <p>System</p> <p>Cancel Save</p>	Assigned To, Due Date
4.	<p>Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.</p>	
5.	<p>For the purpose of this guide, we are going to choose to Approve the form. To do so, select Update Review Status from the dropdown.</p>	
6.	<p>Select Pass from the Review Status dropdown and select Save to disposition the task. You will be asked to confirm your selection and select to continue.</p>	Review Status
7.	<p>Workflow processing will begin and you will be notified that you can refresh the page to view the updated status.</p> 	
8.	<p>When workflow processing is complete, repeat the previous steps for any subsequent review tasks, approving each one.</p>	
9.	<p>When the final review task has been approved and workflow processing is complete, the form can be closed.</p>	


1.10 Review Step

1.10.1 Create Correspondence Step

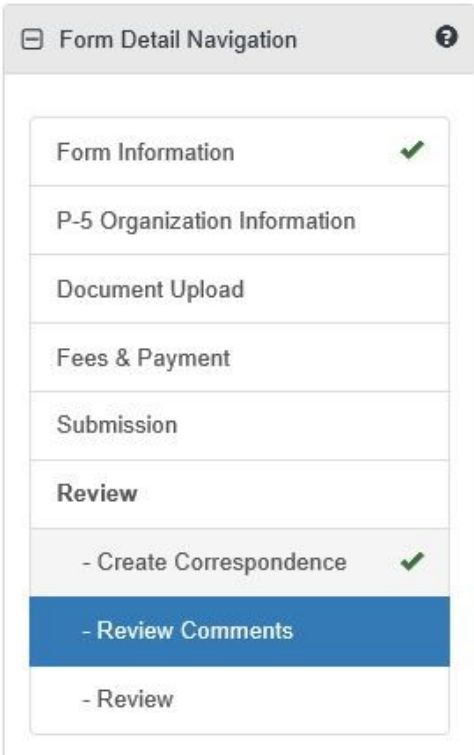
Step	Action	Required Fields
1.	<p>Select the “Review” tab under Form Detail Navigation, and then select “Create Correspondence.”</p>  <p>The screenshot shows a 'Form Detail Navigation' menu with several options. The 'Review' section is expanded, and '- Create Correspondence' is highlighted in blue. Other options include 'Form Information', 'P-5 Organization Information', 'Document Upload', 'Fees & Payment', 'Submission', '- Review Comments', and '- Review', all of which have green checkmarks next to them.</p>	Create Correspondence
2.	<p>For the purpose of this guide, choose “Yes” to Create Correspondence.</p>  <p>The screenshot shows a 'Create Correspondence' dialog box. It contains the question 'Create Correspondence?' with a red asterisk indicating it is a required field. There are two radio buttons: 'Yes' (which is selected) and 'No'.</p>	Yes
3.	<p>Choose not to Send via Certified Mail.</p>  <p>The screenshot shows a 'Create Correspondence' dialog box with a checkbox labeled 'Send via Certified Mail?' which is currently unchecked.</p>	<p>Do not check “Send via Certified Mail?”</p> <p>“Ready to Send” should be left alone until Step 12.</p>

4.	<p>Select the Correspondence Type dropdown to be General.</p> <p>Correspondence Type</p> 	
5.	<p>Complete the Subject line to be “Financial Assurance Correspondence.”</p> <p>Subject *</p> <input data-bbox="266 716 1045 772" type="text" value="Financial Assurance Correspondence"/>	Subject
6.	<p>Complete the Signatory Name field as your preferred name.</p> <p>Signatory Name *</p> <input data-bbox="266 936 639 999" type="text" value="Your Name Here"/>	Signatory Name
7.	<p>For the purpose of this example, do not select to CC any additional organizations. (Leave box blank)</p> <p>CC Organizations</p> <input data-bbox="266 1199 662 1268" type="text"/>	
8.	<p>From the Signatory Department dropdown, select “P-5 Financial Assurance Unit.”</p> <p>Signatory Department *</p> <input data-bbox="266 1472 662 1535" type="text" value="P-5 Financial Assuranc..."/>	Signatory Department
9.	<p>For the purpose of this example, do not select to CC any additional people. (Leave box blank)</p> <p>CC People</p> <input data-bbox="266 1745 656 1808" type="text"/>	

<p>10.</p>	<p>Enter description to be able to identify this document at a later time.</p> <p>Description * </p> <div data-bbox="266 317 654 384" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Example Correspondence</p> </div> <p>Note:</p> <p>This description is not the title of the correspondence, this is meant to be an easily identifiable description that can be used to locate the correspondence at a later time.</p>	<p>Description</p>
<p>11.</p>	<p>Complete the Correspondence Text field with the desired text to be sent to the Organization as the body of the text.</p> <p>Correspondence Text *</p> <div data-bbox="266 764 1057 993" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>This is where you will enter the information that needs to be sent back to the filer.</p> </div>	<p>Correspondence Text</p>
<p>12.</p>	<p>Navigate back to the top of the step, click the “Ready to Send?” Checkbox.</p> <div data-bbox="266 1157 513 1203" style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Ready to Send? </div> <p>Note:</p> <p>If this is not selected, the correspondence will not be sent.</p>	
<p>13.</p>	<p>Select the Preview link, this will download a PDF copy of what the correspondence will look like when sent. This link is below the “Correspondence Text” area.</p> <div data-bbox="266 1503 423 1591" style="margin-bottom: 10px;"> Preview </div> <p>Note:</p> <p>A .pdf will be created, and you will be prompted for the download.</p>	

14.	<p>To navigate to the next step, click “Next.”</p>  <p>Note:</p> <p>Once the form is saved, no edits can be made on the page. If corrections are needed, the form will need to be withdrawn and the user will need to start over. It is important to review all work before saving.</p>	
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1.10.2 Review Comments Step

Step	Action	Required Fields
1.	<p>Select the “Review Comments” tab under Form Detail Navigation. Note: It may be necessary to select the “Review” tab under Form Detail Navigation before the “Review Comments” tab can be seen.</p> 	

2. To add a comment, enter the text of the comment in the comment textbox, select Internal Only? Checkbox if needed.
Select the Add button to add the comment.



Comments

Actions ▾

Comments typed here will be displayed in the box above

Internal Only?

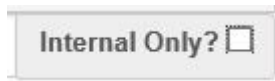
Unless indicated Internal Only, comments are viewable by operators and other external users.

Add

Note:

- Internal Only comments will only be viewable by Internal Users.
- The Internal Only? checkbox selection persists between entering comments.

3. To add an externally facing comment, enter the text of the comment in the comment textbox, deselect the Internal Only? checkbox, and press the Add button. By default, the Internal Only option will not be selected.



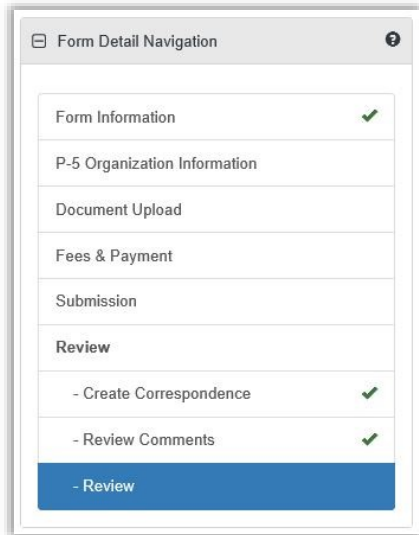
Internal Only?

4. Select the Next button to proceed to the next step.



Back Next

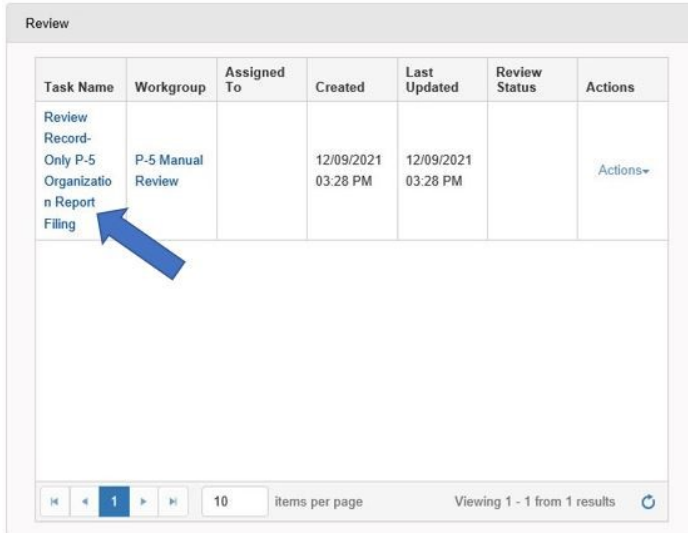
1.10.3 Review Step



- Not all forms will require a Manual Review. Please see the Form Manual for a validation matrix as reference for conditions which trigger a Manual Review.

Step	Action	Required Fields														
1.	<p>The step is pre-populated with a review task to be completed.</p> <div data-bbox="256 1163 1143 1843" style="border: 1px solid #ccc; padding: 10px;"> <p>Review</p> <table border="1"> <thead> <tr> <th>Task Name</th> <th>Workgroup</th> <th>Assigned To</th> <th>Created</th> <th>Last Updated</th> <th>Review Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Review Record-Only P-5 Organization Report Filing</td> <td>P-5 Manual Review</td> <td></td> <td>12/09/2021 03:28 PM</td> <td>12/09/2021 03:28 PM</td> <td></td> <td>Actions→</td> </tr> </tbody> </table> <p>10 items per page Viewing 1 - 1 from 1 results</p> </div>	Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions	Review Record-Only P-5 Organization Report Filing	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		Actions→	
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions										
Review Record-Only P-5 Organization Report Filing	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		Actions→										

2. Before the task can be completed, it must be assigned to yourself. Select the Task Name link to be taken to the Task Detail page.



The screenshot shows a table titled "Review" with the following columns: Task Name, Workgroup, Assigned To, Created, Last Updated, Review Status, and Actions. The first row contains the text "Review Record-Only P-5 Organization Report Filing" in the Task Name column, "P-5 Manual Review" in the Workgroup column, and dates "12/09/2021 03:28 PM" in both the Created and Last Updated columns. A blue arrow points to the Task Name text. Below the table is a pagination bar showing "10 items per page" and "Viewing 1 - 1 from 1 results".

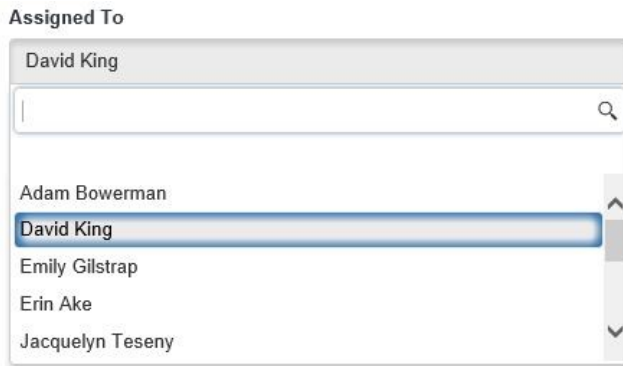
Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
Review Record-Only P-5 Organization Report Filing	P-5 Manual Review		12/09/2021 03:28 PM	12/09/2021 03:28 PM		Actions▼

A separate browser tab will open, showing the Task Detail Page.

3. a) To assign the task to yourself, select the Edit button at the bottom



- b) In the "Assigned To" dropdown, select your name from the list



The "Assigned To" dropdown menu is open, showing a search bar at the top with "David King" entered. Below the search bar is a list of names: Adam Bowerman, David King (highlighted with a blue bar), Emily Gilstrap, Erin Ake, and Jacquelyn Teseny.

- c) Set a Due Date (type manually or use the calendar button at right)



The "Due Date" field is labeled "Due Date *". The input field contains the date "12/15/2021" and has a calendar icon on the right side.

- d) Select Save (you will be taken back to the Review Step of the Form)



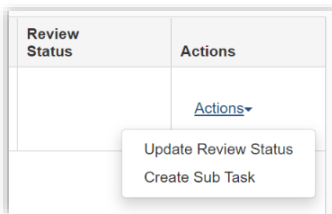
Assigned To, Due Date

4. Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.

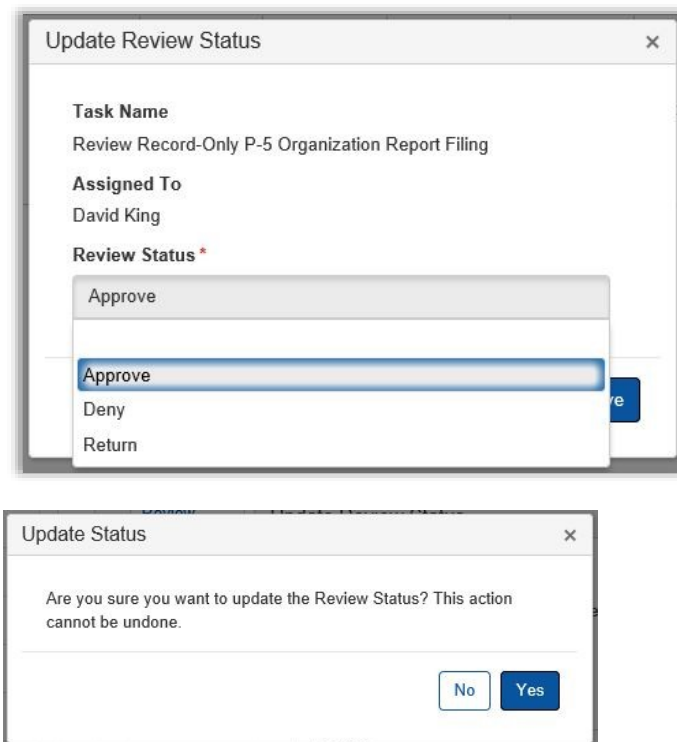


Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
Review Record-Only P-5 Organization Report Filing	P-5 Manual Review	David King	12/09/2021 03:28 PM	12/10/2021 10:33 AM		Actions▼

5. For the purpose of this guide, we are going to choose to Approve the form. To do so, select “Update Review Status” from the dropdown.



6. Select “Approve” from the Review Status dropdown and select Save to disposition the task. When asked to confirm, select “Yes” to continue.



Update Review Status

Task Name
Review Record-Only P-5 Organization Report Filing

Assigned To
David King

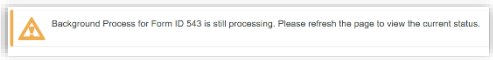
Review Status *
Approve
Approve
Deny
Return

Update Status

Are you sure you want to update the Review Status? This action cannot be undone.

No Yes

Review Status

7.	<p>Workflow processing will begin, and you will be notified that you can refresh the page to view the updated status.</p> 	
8.	<p>Continue the process for the Managerial Workgroup Review task.</p>	
9.	<p>When workflow processing is complete, the P-5 Record Only filing will be updated.</p>	