



User Reference Guide

Document Upload Form
General Navigation

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Document Upload

COURSE OVERVIEW

Course Description

Upload a document to an organization, well, facility, project or pipeline.

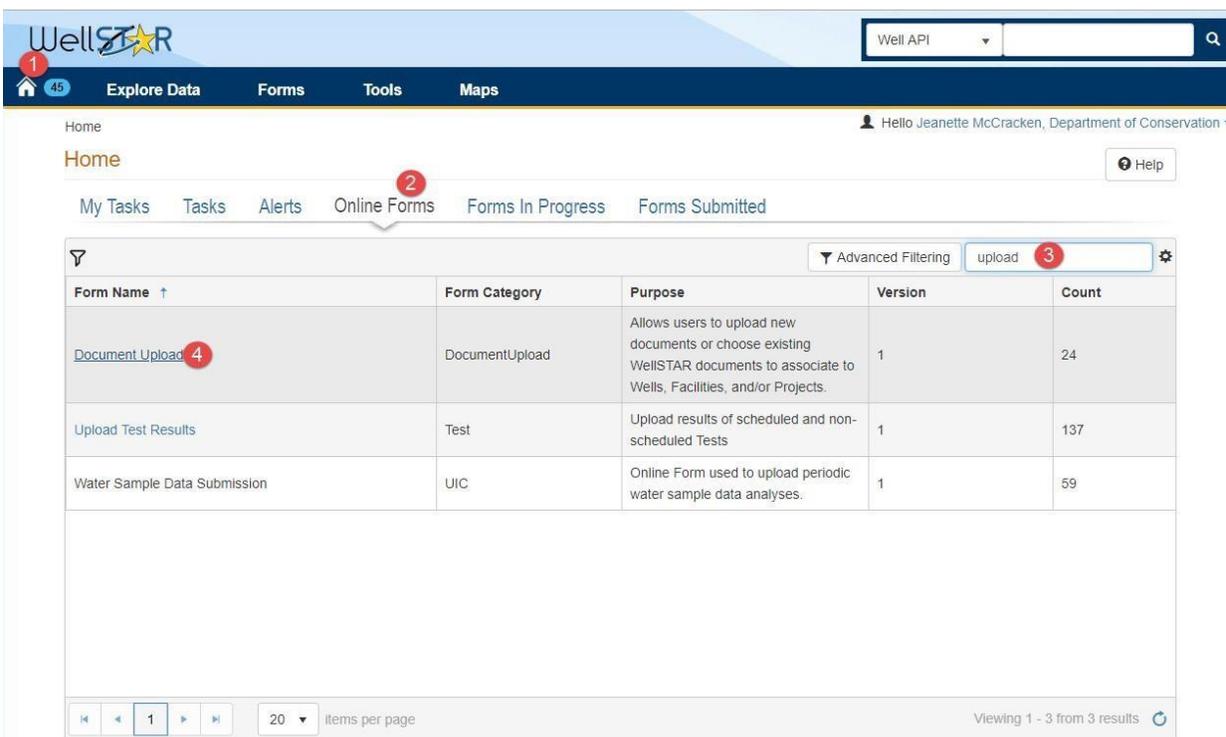
1 UPLOAD A DOCUMENT

A document can be uploaded to an Organization, Well, Facility, Project, or Pipeline.

Lesson Objectives:

- Upload a document to an organization
- Upload a document to a Well, Facility, Project, or Pipeline

1.1 Upload a document to an organization



Step	Action	Required Fields
1	Access the home screen.	
2	Click Online Forms .	
3	Search for Document Upload .	
4	Click the Blue Document Upload hyperlink.	

Document Upload

Step	Action	Required Fields
1.	Choose the Organization . If the form is initiated by an operator, the Organization will be pre-filled.	Organization
2.	Enter a Description .	Description
3.	Click Save and Continue .	

Document Upload

1. Form Information
2. Operator Information
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

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

1 **Organization Name** **Type of Organization**
 Chevron U.S.A. Inc. (C5640) Corporation

Organization Primary Address
 9525 Camino Media
 Bakersfield, CA 93311

Organization Primary Phone Number **Ext**
 (661) 412-6082

Contacts

Advanced Filtering **2**

Name ↑	Phone Number	Email	Role	Actions
Jeanette McCracken	(916) 322-9768	Jeanette.McCracken@conservation.ca.govx	Submitter	
Mr. Nadim Hosn	(661) 654-7469	nhos@chevron.comx	Agent	

3

Step	Action	Required Fields
1	Review organization information.	
2	Add a contact if desired.	
3	Click Save	
4	Click Next .	

Document Upload

Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

1. Form Information
2. Operator Information ✓
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

Document Upload [Hide Form Navigation]

Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Category 1

Well

Uploaded Documents

Advanced Filtering **Actions** 2 Search

Upload... Upload... Type Descri... File **Add New** 3 ... Actions

- Export - Excel
- Export - PDF

Back Next Save

Step	Action	Required Fields
1.	Choose a category. This should relate to the document being uploaded.	Category
2.	Click Actions .	
3.	Click Add New .	

Document Upload

The screenshot shows a 'Document Upload' window with the following elements:

- Step 1:** Radio buttons for 'Upload New Document' (selected) and 'Associate Existing WellSTAR Document'.
- Internal Only** and **Confidentiality Requested** checkboxes.
- Category:** A dropdown menu currently showing 'Facility'.
- Step 2:** A dropdown menu for 'Type *'.
- Step 3:** A date input field for 'Relevant Date *' with a calendar icon.
- Step 4:** A text input field for 'Description *' with a note: 'All comments are discoverable records, open to public review.'
- Step 5:** A 'Browse' button within a file selection area.
- Step 8:** 'Cancel' and 'Upload' buttons at the bottom right.

Step	Action	Required Fields
1.	To associate a new document: Leave the Upload New Document radio option selected.	
2.	Choose a Type of document.	Type
3.	Select a Relevant Date . This is whatever date is most relevant to this document – the date a photo was taken, or an agreement went in to effect.	Relevant Date
4.	Enter a Description . This description will be attached to the document for the life of the document.	Description
5.	Click Browse .	
6.	Navigate to your document.	
7.	Select the document.	
8.	Click Upload .	

Document Upload

* Indicates Required Field

Upload New Document

Associate Existing WellSTAR Document

Document ID *

10073 - Designation of Agent

10203 - Well Summary Form Snapshot

10204 - Well Summary Form Snapshot

10205 - Well Summary Generic Correspondence

10232 - Well Summary Form Snapshot

Cancel Upload

Filename Docum...

Step	Action	Required Fields
1.	To associate an existing Document: Select Associate Existing WellSTAR Document radio option.	
2.	Find the document using the WellSTAR Document ID .	
3.	Click Upload .	

Document Upload

Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

1. Form Information
2. Operator Information ✓
3. Document Upload
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Document Upload [Hide Form Navigation]

Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Category *
Well

Uploaded Documents

Advanced Filtering Actions Search

Upload...	Upload...	Type	Descri...	Filename	Docum...	Docum...	Actions
05/01/2019	Jeanette McCracken	CEQA Document	CEQA Indemnity Agreement 2019	01900347_DATA_5-16-2008.pdf		pdf	Actions

Back **Next** ¹ Save

Step	Action	Required Fields
1	Click Save and then Next .	
2	Scroll to the bottom of 4. Document Association without selecting any Wells, Facilities, or Projects and click Next . Note: The document will be associated to the organization if not Well, Facility, or Project is selected.	

Document Upload

Form Submit [Hide Form Navigation]

Associate related online form submissions to this submission by entering the Form ID or Form Description.

Online Form Association

Actions ▾

Form ID	Form Category	Title	Description	Add Form

Comments ▾

Actions ▾

◀◀0▶▶▶

20▾ items per page

No results to display

Add

All comments are discoverable records, open to public review.

Acknowledgement

Submitter*

Date Received

12/13/2024

📅

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.	Another form may be associated at the Form Submit step by clicking Actions and then Add Form.	
2.	A Comment may be added by typing in the field to the left of the Add button and then clicking Add. COMMENTS ARE PERMANENT AND CANNOT BE DELETED.	
3.	Check the acknowledgment box. This will populate the Submitter field with your name.	acknowledgment box
4.	Click Preview Submission Summary and verify that the form conforms to your expectations.	
4.	Click Submit .	

1.1.1 Key Points:

- This method will associate the document to the organization selected.
- This document will be accessible through the organization documents page after approval.

1.2 Upload a document to a Facility, Well, Project (UIC or UGS), or Pipeline.

The screenshot shows the WellSTAR web application interface. At the top, there is a navigation bar with 'WellSTAR' logo, a search bar, and menu items: 'Home', 'Explore Data', 'Forms', 'Tools', and 'Maps'. A user profile is visible as 'Hello Jeanette McCracken, Department of Conservation'. Below the navigation bar, there are tabs for 'My Tasks', 'Tasks', 'Alerts', 'Online Forms', 'Forms In Progress', and 'Forms Submitted'. The 'Online Forms' tab is selected. A search filter 'upload' is applied to the 'Advanced Filtering' dropdown. A table lists the following forms:

Form Name	Form Category	Purpose	Version	Count
Document Upload	DocumentUpload	Allows users to upload new documents or choose existing WellSTAR documents to associate to Wells, Facilities, and/or Projects.	1	24
Upload Test Results	Test	Upload results of scheduled and non-scheduled Tests	1	137
Water Sample Data Submission	UIC	Online Form used to upload periodic water sample data analyses.	1	59

At the bottom of the table, there is a pagination control showing '20 items per page' and 'Viewing 1 - 3 from 3 results'.

Step	Action	Required Fields
1.	Access the home screen.	
2.	Click Online Forms .	
3.	Search for Document Upload .	
4.	Click the Blue Document Upload hyperlink.	

Document Upload

The screenshot shows the 'Document Upload' form in the WellSTAR system. The form is titled 'Document Upload' and includes the following fields:

- Form Name:** Document Upload
- Organization *:** Chevron U.S.A. Inc. (C5640) - Bakersfield, CA (marked with a red circle 1)
- Description *:** Upload Indemnity Agreement 2019 (marked with a red circle 2)

At the bottom of the form, there are two buttons: 'Cancel' and 'Save & Continue' (marked with a red circle 3). A legend indicates that an asterisk (*) denotes a required field.

Step	Action	Required Fields
1	Choose the Organization . If the form is initiated by an operator, the Organization will be pre-filled.	Organization
2	Enter a Description .	Description
3	Click Save and Continue .	

Document Upload

1. Form Information
2. Operator Information
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
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8. Review

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

1 **Organization Name** **Type of Organization**
 Chevron U.S.A. Inc. (C5640) Corporation

Organization Primary Address
 9525 Camino Media
 Bakersfield, CA 93311

Organization Primary Phone Number **Ext**
 (661) 412-6082

Contacts

2

Name ↑	Phone Number	Email	Role	Actions
Jeanette McCracken	(916) 322-9768	Jeanette.McCracken@conservation.ca.govx	Submitter	
Mr. Nadim Hosn	(661) 654-7469	nhos@chevron.comx	Agent	

3

Step	Action	Required Fields
1	Review organization information.	
2	Add a contact if desired.	
3	Click Next .	

Document Upload

Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

- 1. Form Information
- 2. Operator Information ✓
- 3. Document Upload
- 4. Document Association
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 8. Review

Document Upload [Hide Form Navigation]

Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Category 1

Well ▼

Uploaded Documents

Advanced Filtering
Actions ▼

⚙️

Upload...	Upload...	Type	Descri...	File	Add New 3	am...	Actions

Back Next Save

Step	Action	Required Fields
1	Choose a category. This should relate to the document being uploaded.	Category
2	Click Actions .	
3	Click Add New .	

Document Upload

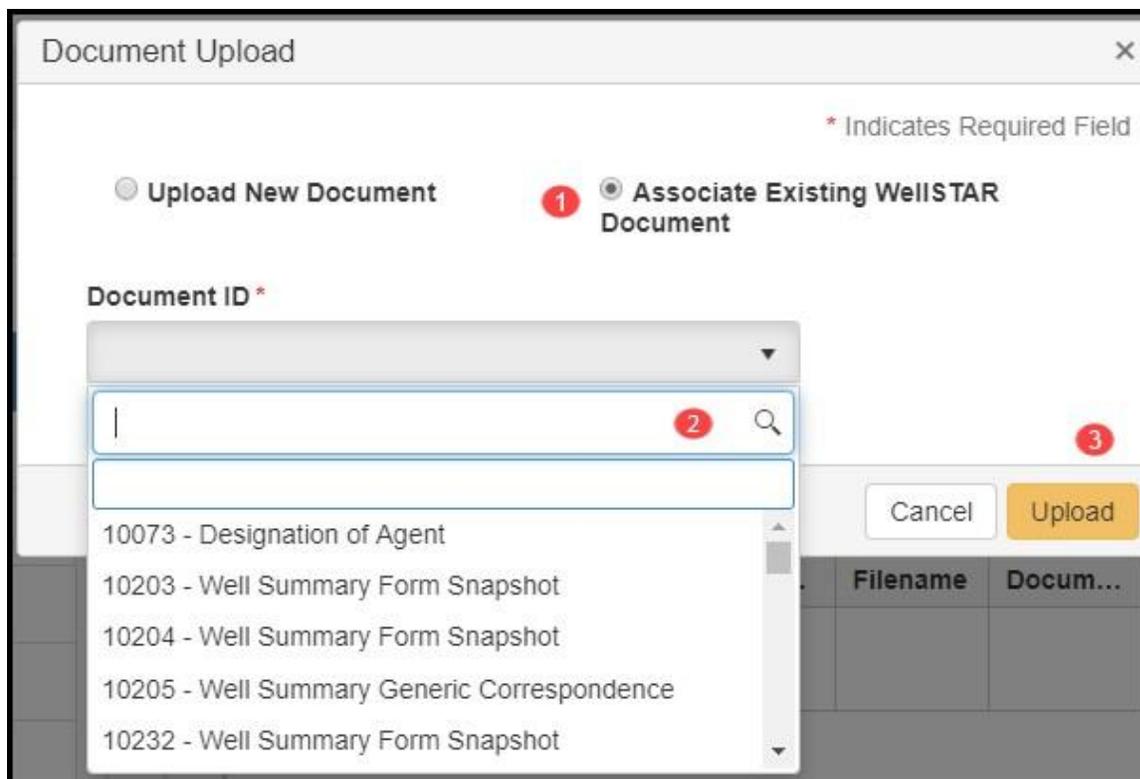
The screenshot shows a 'Document Upload' window with the following elements:

- Step 1:** Radio buttons for 'Upload New Document' (selected) and 'Associate Existing WellSTAR Document'.
- Step 2:** A dropdown menu for 'Type'.
- Step 3:** A date input field for 'Relevant Date'.
- Step 4:** A text input field for 'Description'.
- Step 5:** A 'Browse' button within the 'Filename' field.
- Step 8:** The 'Upload' button at the bottom right.

Other visible fields include 'Internal Only', 'Confidentiality Requested', and a 'Category' dropdown set to 'Facility'. A note states: 'All comments are discoverable records, open to public review.'

Step	Action	Required Fields
1	Leave the Upload New Document radio option selected.	
2	Choose a Type of document.	Type
3	Select a Relevant Date . This is whatever is most relevant for this document – the date a photo was taken, or the date an agreement went into effect, etc.	Relevant Date
4	Enter a Description . This description will be attached to the document for the life of the document.	Description
5	Click Browse .	
6	Navigate to your document.	
7	Select the document.	
8	Click Upload .	

Document Upload



Step	Action	Required Fields
1.	To associate an existing Document: Select Associate Existing WellSTAR Document radio option.	
2.	Find the document using the WellSTAR Document ID .	
3.	Click Upload .	

Document Upload

Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

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Document Upload [Hide Form Navigation]

Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Category *
Well

Uploaded Documents

Advanced Filtering Actions Search

Upload...	Upload...	Type	Descri...	Filename	Docum...	Docum...	Actions
05/01/2019	Jeanette McCracken	CEQA Document	CEQA Indemnity Agreement 2019	01900347_DATA_5-16-2008.pdf		pdf	Actions

Back **Next** ¹ Save

Step	Action	Required Fields
1	Click Next .	

Document Upload

Select Project

Advanced Filtering
Actions

Search 1

⚙️

<input type="checkbox"/>	Project ID ↑	Type	Field	County	Status
<input type="checkbox"/>	05406001	Water Disposal	Beverly Hills	Los Angeles	Terminated
<input type="checkbox"/>	12200004	Water Disposal	Casmalia	Santa Barbara	Terminated
<input type="checkbox"/>	12806007	Water Disposal	Cat Canyon	Santa Barbara	Terminated
2	12815017	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12815019	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821018	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821019	Water Disposal	Cat Canyon	Santa Barbara	Canceled
<input type="checkbox"/>	12821020	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821021	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821022	Water Disposal	Cat Canyon	Santa Barbara	Terminated

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1
2
3
4
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7
8
9
10
...
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▶▶

10

items per page
Viewing 1 - 10 from 177 results
🔄

3
▼
▲

Associated Project

Advanced Filtering
Actions

Search

⚙️

<input type="checkbox"/>	Project ID	Type	Field	County	Status
<input type="checkbox"/>	12815017	Water Disposal	Cat Canyon	Santa Barbara	Terminated

Document Upload

Step	Action	Required Fields
1.	Search for the Well, Facility, Project, or Pipeline the document should be associated to.	
2.	Click the box next to the selected subject.	
3.	Use the down arrow to move the subject into the associated lower grid. If you do not use the down arrow to move the subject into the lower grid, the association will not be finalized.	
4.	Click Next .	

Form Submit
[Hide Form Navigation]

Associate related online form submissions to this submission by entering the Form ID or Form Description.

Online Form Association

Actions ▾
⚙

Form ID	Form Category	Title	Description	
				Add Form

Comments
▾

Actions ▾

◀
◀
0
▶
▶▶

20
▾
items per page

No results to display
🔄

Add

All comments are discoverable records, open to public review.

Acknowledgement

Submitter*

Date Received

12/13/2024

📅

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.	Another form may be associated at the Form Submit step by clicking Actions and then Add Form.	
2.	A Comment may be added by typing in the field to the left of the Add button and then clicking Add. COMMENTS ARE PERMANENT AND CANNOT BE DELETED.	
3.	Check the acknowledgment box. This will populate the Submitter field with your name.	acknowledgment box
4.	Click Preview Submission Summary and verify that the form conforms to your expectations.	
4.	Click Submit .	

Document Upload

1.2.1 Key Points

- The document will be stored on the documents grid for each subject specified in 4. Document Association.
- If a subject is selected on 4. Document Association the document will not additionally be stored on the Organization documents page.