Colorado Oil and Gas Conservation Commission
eForm Training

Form 10 Tutorial
Denver, CO
303-894-2100
Creating a new Form 10

- Certification of Clearance and/or Change of Operator
  - The eForm Form 10 is to be submitted for New Well Transporter/Gatherer selection, Transporter/Gatherer additions and deletions, or for Change of Operatorship

- Report tabs:
  - Operator & Purpose, Transporter/Gatherer, New Well, Identification List, Attachments, Submittal, Review, General Comments/COA.

- Examples of each tab follows.
Make sure you scroll down to see all data fields available for entry.

The “SUBMITTING” Operator Information will populate from your sign-in information.

The “SUBMITTING” Operator Contact Information is entered here and can be saved as a Data Template – see below.

See following screens for directions on items 5 thru 15: Purpose of Form section

Each user can create a template so the operator contact information will automatically populate from their own individual template.
The purpose of submission is for ONLY one of the following reasons:

**New Well Certification of Clearance** (for newly completed wells, item 5), (See this slide-below)
Add/Change Transporter and/or Gatherer (for existing wells, item 7), or
Change of Operator and Designation of Transporter and/or Gatherer (item 8.)

You must select “Yes” from the dropdown for either item 5, 7 or 8. **Only one purpose is allowed.**

Item 6 is not applicable if the purpose of this submission is for New Well Cert of Clearance

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### New Well Certification of Clearance

*Rule 312a requires Certificate of Clearance for each well producing oil or gas, or both, to be filed within thirty (30) days after initial sale of oil or gas.*

The eForm Form 10 allows for multiple well submission to accommodate all wells completed over the last 30 days.

Selecting YES for item 5 will require valid entries for:
“Transporter/Gatherer,” and “New Well” tabs.

Scroll to the appropriate instructional slides for more information.

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Make sure you scroll down to see all data fields available for entry. See following slides for the lower portion of this screen.
When the purpose of submission is for:

Add/Change Transporter and/or Gatherer (for existing wells, item 7)

Item 6 is **REQUIRED** when the purpose of submission is for Add/Change Transporter and/or Gatherer.

**Add/Change Transporter and/or Gatherer**

*Rule 312a requires Certificate of Clearance for each well producing oil or gas, or both, to be filed within thirty (30) days should the oil transporter (first purchaser) and/or the gas gatherer (first purchaser) change.*

The eForm Form 10 allows for multiple well submission to accommodate multiple wells affected by add or change.

Selecting YES for item 7 will require valid entries for: “Transporter/Gatherer” AND “Identification List” tabs.

Scroll to the appropriate instruction slides for more information.
When the purpose of submission is for:

**Change of Operator and Designation of Transporter and Gatherer (item 8)**

**Item 6 is REQUIRED** when the purpose of submission is for Change of Operator and Designation of Transporter and Gatherer.

**Change of Operator and Designation of Transporter and Gatherer**

*Rule 312a requires a Certificate of Clearance for wells producing oil or gas, or both, whenever there is a change in the producer or operator.*

The eForm Form 10 allows for multiple well submission.

Selecting YES for item 8 will require valid entries for: Surety ID# assigned by COGCC, individual or blanket (indicate if bond is a blanket bond), "Transporter/Gatherer," and "Identification List" tabs.

Scroll to the appropriate instruction slides for more information.

If item 8 is "YES" and the purpose of the Form 10 is Change of Operator and Designation of Transporter/Gatherer, then items 9 thru 15 should be completed.

**Item 9:** The submitting operator needs to identify if they are the Buying or the Selling operator.

If the Submitting Operator is the Buyer, then the NON-submitting operator is the Selling Operator, and vice versa.

The Submitting Operator would need to complete items 10 thru 15 for the Non-submitting Operator on the other end of the transaction.

This is the bottom half of the tab. It is a good idea to "Save" this screen upon completion, prior to moving to the next tab.
**More on Surety ID #**

New Well Certification of Clearance will **not** require a surety ID entry as this was reviewed at the time of initial permitting.

**Change of Operator:** The “Surety ID” field, next to item #8 drop down box, will only become editable if the “Blanket Bond” field is checked.

If the surety is for an individual well, you will enter that information in the Identification List tab’s data entry grid.

If “Blanket Bond” is checked, and “Surety ID” field is populated, you will not be required to enter individual surety ID #’s on the Identification List data entry grid for each well.
When item #8, Change of Operator and Designation of Transporter and Gatherer, is selected as the purpose of the Form 10 submission:

In addition to valid entries for assigned COGCC Surety ID#, “Transporter/Gatherer,” and “Identification List” tabs, please note the additional specific requirements shown in red under item 9.

Eform will not allow submittal without a ratification document attached. This document can be a certification of the sale/transfer, an assignment, a bill-of-sale, a signed paper Form 10 (printed from the eForm “View”), or other document confirming the change of operator transaction. Whatever proof the parties elect to attach will be satisfactory to the COGCC, provided it includes the names of the selling and buying parties, the names, titles, and signatures of representatives of each party, and a description of the oil and gas facilities included in the change of operator.

Scroll to the “Attachments” instruction slides (#24) for more information on how to upload (attach) documents.
Transporter/Gatherer Tab

Click the “Add” button to create entry rows as needed.

Enter the COGCC Transporter/Gatherer (T/G) assigned number. The name and address will populate automatically. Complete the T/G phone and email if known.

Select ADD or DELETE from the “Action” dropdown, and choose a product, OIL or GAS, from the “Product” dropdown.

The T/G details will be hidden as you add each new data entry row. Click on <...more details...> to display address, phone and email info.

Click the “Remove” button to remove entry rows created by accident that are not needed.
Click the "Modify/View New Wells" button to open the New Well data entry screen. (This button will not be active if you do not have Yes for New Well selected on Tab 1)

This data entry table/grid will open.

Click the "Add" button to create entry rows as needed.

See next tab for detailed instructions.
Click the “Add” button to create entry rows as needed. The system keeps count – this allows for easy comparison.

Save Updates here – save prior to closing the window!

New Well Data Entry Grid

New Wells require entry for the Date of First Production and the Date of First Sales for Gas or Oil, or for both.

If you add both an oil transporter, and a gas gatherer, you will need dates of first sales for both!!!!

See next screen for adding/deleting Transporter/Gatherer for each well.

Entry of the API# will populate the Well Name, Number and Location – PLEASE review this data for correctness!
Click the “Delete” button to remove entry rows not needed. There is also the “Remove All” button.

Save Updates here – save prior to closing the window!

New Well Data Entry Grid

Click on a line of data to highlight it (in blue) and then the Trans/Gath# data grid will be visible. The transporter/gatherer data is invisible if you have not clicked on a specific well line of data.

You will see a “Add” and “Remove” button (currently covered by the blank blue highlighted line which is waiting for a selection from the two possible choices that you entered on the Trans/Gath tab). This “Add” button is to now add applicable Transporter/Gatherer selection for each well for each product.

The “Add” button gives you the blue highlighted line. Click on the dropdown arrow to select from the list of Transporter/Gatherer’s you entered in the Transporter/Gatherer screens.

You can add as many Transporter/Gatherer’s as needed for each well.

The “Remove” button is used to remove any Trans/Gath line you may have added in error.

You must select at least one transporter or gatherer for each well – there is no way to make it repeat the selection automatically.

See next slide for uploading New Wells from an Excel Spreadsheet!!
Click the “Modify/View New Wells” button to open the New Well data entry screen.

Click the “Download Data Template” This will open the COGCC folder for downloadable templates.

Select the NewWell_Template spreadsheet. This is the ONLY acceptable format that can be uploaded and captured into the eForm data fields.

Once your spreadsheet is complete and verified for correctness you will need to save it to a spot you can retrieve it from. You must close the spreadsheet before attempting to upload it.

Use the “Import Data” to pull it in to the system.
This is a screen shot of pop-up window that will get you to the NewWell_Template.zip file. You need to select Open, Save, or Save as. Clicking Open will result in the message below, you may Open, Save or Cancel.

Open will get you to our folder containing the NewWell_Template spreadsheet.
The NewWell_Template spreadsheet only requires entries for the 3-digit County Code, 5-digit API Sequence Number of the well and the Date of First Production, and Dates of First Sales for either Oil or Gas, or both. **If you add both an oil transporter and a gas gatherer you should have BOTH dates of first sales entered!!!**

Once the API’s are pulled into the system the rest of the well data will populate, that is why those columns are grayed out. You can enter in them put the data will be ignored by the COGCC eForm system when you upload.

See next slide for entering more than one Transporter/Gatherer number (Trans/Gath#).
You can see that only the 3-digit County Code, 5-digit API Sequence Number, Date of First Production, and Dates of First Sales for both Oil and Gas have been entered.

**REMINDER:** If you add both an oil transporter and a gas gatherer you should have BOTH dates of first sales entered!!!

When the API#'s are pulled into the system it will pull the rest of the well data. Any data you enter in the grayed out cells will be ignored by the COGCC eForm system when you upload.

**DO NOT ALTER THE FORM OR STRUCTURE IN ANY WAY! It must remain in this format!!!**

In order to enter more than one Transporter/Gatherer number, you must duplicate all of the cells except the Trans/Gath# cell. The system will read the duplicate and capture both Trans/Gath#'s. If the data is not exactly identical you will have multiple lines rather than multiple Trans/Gath’s on one line for each well.

When you have completed your spreadsheet you will save it to a destination of your choosing and with a naming system that suits your needs. You must close the spreadsheet prior to attempting to upload it back into eForm.
Example of locating a saved New_Well spreadsheet for eForm import from my document library.

Select your file and click “Open”

The file will be imported and will populate the data-entry grid as if you entered each into the grid yourself. The spreadsheet will be saved automatically as an attachment in eForm for this document number.

You will click the Save Updates.
The previous several slides have pertained to newly completed wells. Now we will look at the entry grid used for adding or changing transporter/gatherer information and for changes of operator where designation of transporter/gatherer is required by statute.

Click the “Modify/View Identification List” button to open the Identification List data entry screen. (This button will not be active if you do not have Yes for Add/Change Trans/Gath or Change of Operator selected on Tab 1.)

Identification List tab –

Click the “Add” button to create entry rows as needed.

See next tab for detailed instructions.
This tab is similar to the NewWell tab, except that it accommodates changing the operator for more than just wells.

In accordance with COGCC Rules, operators will need to list all related pits, tank battery’s, etc. Therefore you must select a “Type” and complete the appropriate number associated with that item.
Each “Type” of item selected will have a green box for the type of number it should have. A well has an API number and our database will pull the data into the grayed boxes.

Pits, UIC Disposal, Tank Battery, (and others), have a Facility ID (Fac ID), and Locations have a Location ID (Loc ID). All of these numbers are available online.

The operator is responsible for reviewing the data that populates the grayed boxes. If you find something is in error you can click on the “Upd. Req.” box and it will allow you to make changes to the grayed out boxes of information. Be sure about your updates - These updates will generate a report that staff can review. We use SHL, not BHL.
This data entry grid is our internal view and has the “Action” column. Operator’s will not see this column. Upon initial entry by operators into eForm the listed items will always be “Pending” until COGCC staff either approve or delete that line of data.

Once this form is submitted and worked through by COGCC staff, the named contact person will receive an email “Approved” Form 10. That PDF Form 10 will list all wells that are “Approved” or “Deleted.” It is imperative that operators thoroughly review these approved Form 10’s as this is our only notification that something has been deleted from your original submission. It is operator responsibility to manage what was submitted compared to what we approved.

This step was necessary in order to not needlessly hold up approval for submitted facilities. We must have the ability to approve the Form 10 without putting it on hold for problem items. Be sure to watch for any “Deleted” items on your approved Form 10’s, as those items treated as being EXCLUDED from the approval and will require resubmission by the operator.
Data Download Template and Importing with the Identification List tab:

Just like the New Well tab, the Identification List tab has the Download Data Template and Import feature. Click the “Download Data Template” to open the COGCC folder for downloadable template.

Select the IdentificationList_Template spreadsheet. This is the ONLY acceptable format that can be uploaded and captured into the eForm data fields.

Once your spreadsheet is complete and verified for correctness you will need to save it to a spot you can retrieve it from. You must close the spreadsheet before attempting to import/upload it. See the following slide for a sample of the IdentificationList_Template.

Once complete, use the “Import Data” to pull the spreadsheet back into the system. Follow the same “Import Data” instructions on slide #15.
The IdentificationList_Template spreadsheet has four columns with a dropdown box. You must select from the dropdown box in order to match eForms accepted and recognized data points.

This is the ONLY acceptable format that can be uploaded and captured into the eForm data fields. You cannot add or delete columns of data.

**Do not change the formatting in anyway or your spreadsheet will not import.**

Data entry to this spreadsheet will require some due diligence and responsibility on the operator/data entry persons part. You will need to enter the correct category of identifying number for the specific Facility Type you select from column A. (See slide #18 for explanation of identifying number to type of facility.)

The database can retrieve columns F through M once the spreadsheet is imported into eForm. From there we ask that you verify the details in columns F through M for correctness. If any piece of data is missing, or is incorrect, you can select the “Update Request” box.

Once your spreadsheet is complete and verified for correctness you will need to save it to a spot you can retrieve it from. You must close the spreadsheet before attempting to upload it.

Use the “Import Data” to pull the spreadsheet in to the system.
Press **New Attachment** to browse operator system or network to upload attachment. Note: Must be in PDF or .xlsx format.

In the event an attachment would need to be deleted – Click the box to create the check box in the Delete column. You MUST also click on the Save Updates for the attachment to actually delete.

Press **Save Updates** to save the attachments after adding all of the documents, then press the **Close** button.

Imported spreadsheets automatically save here as an attachment.

Change of Operator ratification documents will be added using this tab.
Submittal Tab – contains the signature data for the agent submitting the form.

Click the checkbox on to populate Submitter’s name and email as it was entered in the Operator & Purpose screen for Submitter’s Contact information.

The title will need to be completed as there is no title field from the previous tab.

Enter any operator comments here.
The form is in draft status until it is submitted to the system. The five function keys at the bottom of each page will complete the following tasks.

- **Save**: The data will be validated against the Rules Engine and will be saved to the database.
- **Validate**: The data will be validated and errors will be listed but no data will be written to the database.
- **Print Preview**: A PDF report of the data entered and saved to the database will be created.
- **Submit**: This button will only be available when the data entered has been saved to the database and there are no errors when validation has been run.
- **Exit**: Selecting this option will close the form and return the user to the dashboard.

Once you have saved and/or validated your form the “Submit” button will no longer be grayed out.

Click on the submit button and the form will upload to the database. You should receive a “successfully submitted” message unless there is a problem that needs to be addressed.

Each user can create a template so certain operator information will be saved and will automatically populate from the individual’s template.
Watch the COGCC webpage for announcements on new electronic forms developments!

Feel free to contact our office at 303-894-2100 if you have any questions or need assistance with the eForm applications.
End Tutorial

- Visit other tutorials as needed
  - First Time Users:
    - Set-up
    - Create New Users
  - Creating and Locating Electronic Forms
    - The basics of signing on to the system
    - The basics of the dashboard
    - The basics of creating a new form
    - The basics of locating an existing form
  - Form Creation for Permitting:
    - Form 2
    - Form 2A
  - Form Creation for Completions:
    - Form 5
    - Form 5A