



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

Release 1 Software Design

User Guide

P-5 Renewal

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COURSE OVERVIEW

Course Description

This guide can be used to complete a P-5 Renewal.

1.1 Launching the Form

1.1.1 Key Points

- Users with sufficient security roles can launch the form.

1.1.2 Steps to launch the form

Step	Action	Required Fields
1.	Navigate to the Internal Landing page.	
2.	Select the Forms dropdown menu and select Online Forms .	
3.	Select the P-5 Organizational Report from the Online Forms Table.	

1.2 Form Information Step

Form Information

Please enter information below. * Indicates required field

Form Name
P-5 Organization Report

Purpose for Filing:

New

Select Organization *
WASKOM TRANSMISSION LLC (900080)

Plan of Organization * ⓘ

Limited Liability Company (LLC or LC)

Description *

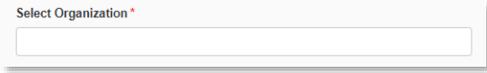
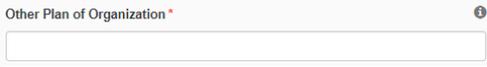
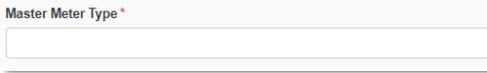
123

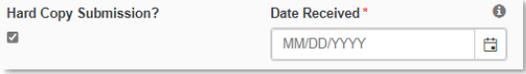
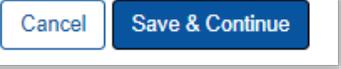
All comments are discoverable records, open to public review.

1.2.1 Key Points

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

1.2.2 Steps to complete Form Information

Step	Action	Required Fields
1.	Under Purpose for Filing , select Renewal . 	
2.	The organization name in the Select Organization text box will need to be selected. 	
3.	Select the appropriate business model value from the Plan of Organization dropdown menu. 	
4.	If the Plan of Organization value from Step 3 is Other , enter a plan of organization in the Other Plan of Organization text box. 	
5.	If the Plan of Organization value from Step 3 is Master Meter , select the appropriate value from the Master Meter Type dropdown menu. 	
6.	If the Master Meter Type value from Step 5 is Other , enter a master meter type in the Other Master Meter Type text box. 	
7.	If the P-5 Organization Report was not submitted online enter the Date Received in the text box. The box under Hard Copy Submission should already be selected.	

		
8.	<p>The form description Renewal of P-5 Organization will auto populate in the Description text box. This value cannot be changed.</p> 	
9.	<p>Select Save & Continue to save the form information and proceed to the next step. Selecting Cancel will discard the form information and return the user to the Home page.</p> 	
	<p>Note:</p> <p>At this point, this is now considered a form instance in LoneSTAR and the Form Information step can no longer be edited.</p>	

1.3 Organization Information Step

P-5 Organization Information

Please enter information related to the Organization below. * Indicates required field

Secretary of State Information

Does the Organization Name require updating?
 Yes No

Secretary of State Filing Number *

Charter Status * Organization Type *

Organization Match Type * Assumed Name Expiration Date

Filing Date

Secretary of State Names on File

Please select one radio button below to indicate which name should be used on your P-5 application. *

Name	Type	Status	Expiration Date

P-5 Organization Information

Organization Addresses

Organization Phone Numbers

Organization Email Addresses

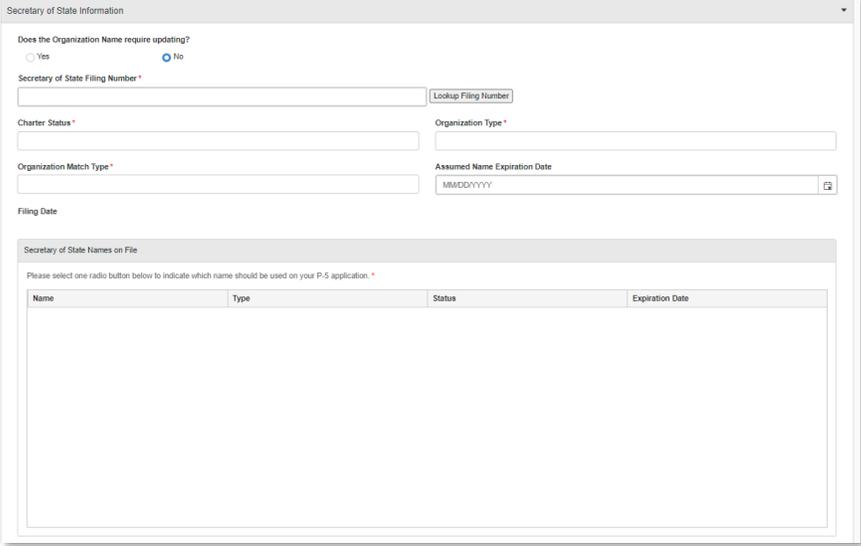
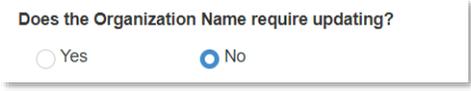
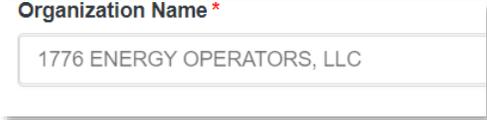
Associated Organizations

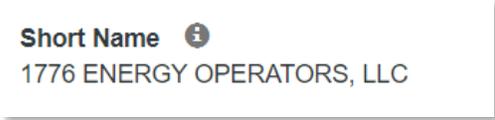
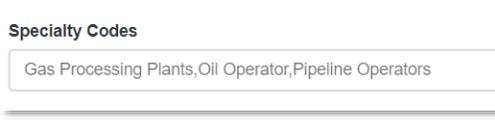
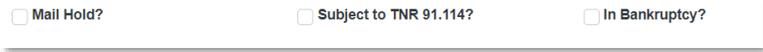
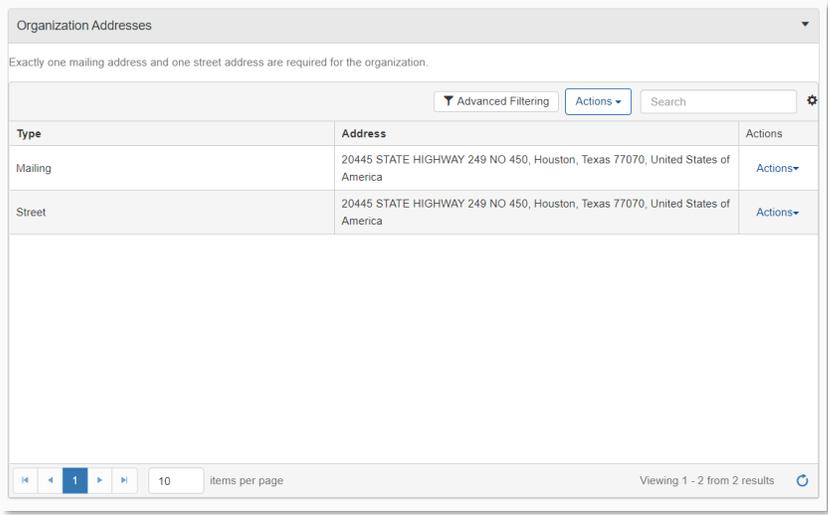
Texas Resident Agent Information

1.3.1 Key Points

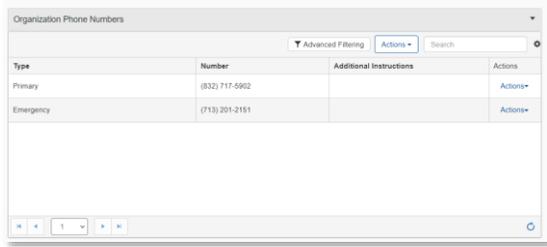
- Learn how to confirm Organization Information.

1.3.2 Steps to complete P-5 Organization Information

Step	Action	Required Fields
1.	<p>The Secretary of State Information subsection will display if the Plan of Organization value from Step 1.2.2.3 is Cooperative, Corporation, Limited Liability Corporation, or Limited Liability Partnership.</p> 	
2.	<p>Under Does the Organization Name Require Updating?</p> <p>Select No if the organization name has not changed since the last P-5 filing.</p> <p>Select Yes if the organization name has changed since the last P-5 filing.</p> <p>For a Renewal, the Secretary of State information will not auto-populate until the file number is keyed.</p> 	
3.	<p>The Organization Name text box will auto-populate with the preselected organization name. This value is read-only unless a name change was indicated under the Secretary of State Information subsection.</p> 	

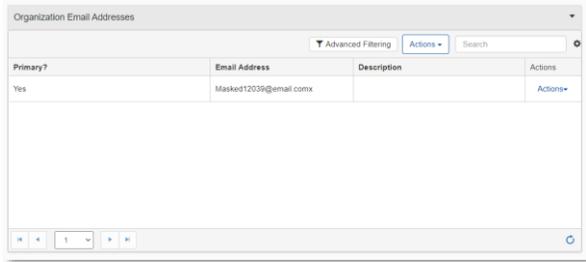
<p>4.</p>	<p>The Organization Short Name text box will auto-populate with the preselected organization name as stored in Mainframe. This value is read-only unless a name change was indicated under the Secretary of State Information subsection.</p> 	
<p>5.</p>	<p>The Specialty Codes text box will auto-populate with the preselected organization specialty codes. This value is read-only.</p> 	
<p>6.</p>	<p>The Mail Hold?, Subject to TNR91.114?, and In Bankruptcy? values will auto-populate with the preselected organization information. These values are read-only to external users. These values are editable to internal users.</p> 	
<p>7.</p>	<p>The Organization Address sub-section allows a user to view, add, or edit the addresses associated with the organization. This information can be edited by using the grid level action drop down menu.</p> 	
<p>8.</p>	<p>The Organization Phone Numbers sub-section allows a user to view, add, or edit phone numbers associated with the organization. This</p>	

information can be edited by using the grid level action drop down menu. Existing phone numbers will auto-populate.



Phone numbers must be exactly 10 digits.

9. The **Organization Email Addresses** sub-section allows a user to add or edit an organization email address. This information can be edited by using the grid level action drop down menu. Existing email address(es) on file will auto-populate.



10. The **Associated Organizations** sub-section allows a user to search and associate another organization to the contextual organization. Existing associated organizations will display.



11. The **Texas Resident Agent Information** sub-section displays if the Organization Street address is not in the state of Texas. If the Box under **“Is Texas Resident Agent a Company?”** is selected, then the **Business Name** will need to be entered instead of **First, Middle, and Last Name**. Refer to People Information Step in next section (1.4.2).

12. Select **Next** to save the organization information and proceed to the next step. Select **Save** to save the organization information without proceeding to the next step. Selecting **Back** will return the user to the **Form Information** page.

	<p data-bbox="282 216 558 281">Back Next Save</p>	
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1.4 People Information Step

People

You have indicated that your organization is a Limited Liability Corporation. Please ensure that your officer listing includes the following * Indicates required field

Officer Titles:

- Option A: 1) President; and 2) One or more of the following: Vice President, Secretary, or Treasurer
- Option B: One or more of the following: Managing Member, Manager, or Member.

Officer Listing (P-50)

Advanced Filtering Actions Search

Officer Name	Officer Title	Officer ID Type	TNR 91.114?	Edited?	Actions
First Name M Last Name	Managing Member	Social Security Number	N	Y	Actions+

10 items per page Viewing 1 - 1 from 1 results

SOS Officer Information

Is Officer a Company?	Officer Name	Officer Title	Last Updated
-----------------------	--------------	---------------	--------------

0 items per page No results to display

Non Employee Agent Information (P-5A)

Advanced Filtering Actions Search

Name	Address	Actions
------	---------	---------

0 items per page No results to display

Other Person

Advanced Filtering Actions Search

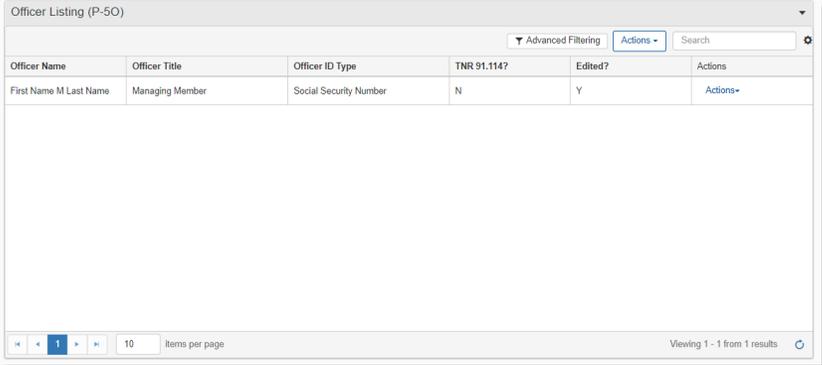
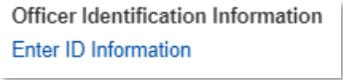
Name	Address	Actions
------	---------	---------

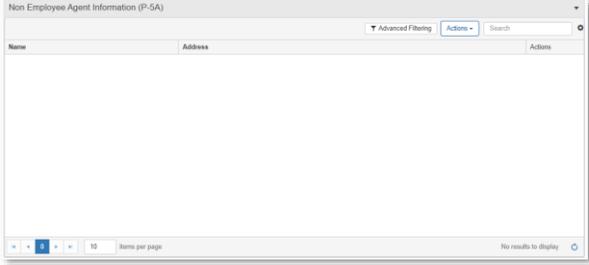
0 items per page No results to display

1.4.1 Key Points

- Learn how to complete the People Information step.

1.4.2 Steps to complete People Information

Step	Action	Required Fields
1.	<p>The Officer Listing (P-50) sub-section allows the user to add, view, edit or delete the Officers associated to the contextual P-5 Organization. This information will pre-populate with the officer’s existing information.</p>  <p>Address Validation button at bottom needs to be selected before SAVE can continue.</p> <p>Legal name is required. If the name legally is initials, then the operator must supply a copy of their Driver's License.</p>	
2.	<p>To edit an existing officer, select the officer from the row-level actions button and select “Edit Officer”.</p> <p>Note:</p> <p>The same selection can be used on the Non-Employee Agent Information grid and the Other People grid to modify existing information.</p>	
3.	<p>The Officer Information modal will display and be pre-populated with the officer’s existing information.</p>	
4.	<p>If the Officer Identification information needs to be edited, select the “View ID Information” link to display related fields.</p> 	

5.	<p>The Non-Employee Agent Information (P-5A) sub-section allows the user to add, view, edit or delete the Non-Employee Agents associated to the contextual P-5 Organization.</p> 	
6.	<p>The Other People sub-section allows the user to add, view, edit or delete other people.</p> 	
7.	<p>Select Next to save the people information and proceed to the next step. Select Save to save the people information without proceeding to the next step. Selecting Back will return the user to the Organization Information page.</p> 	

1.5 Document Upload Step

Document Upload

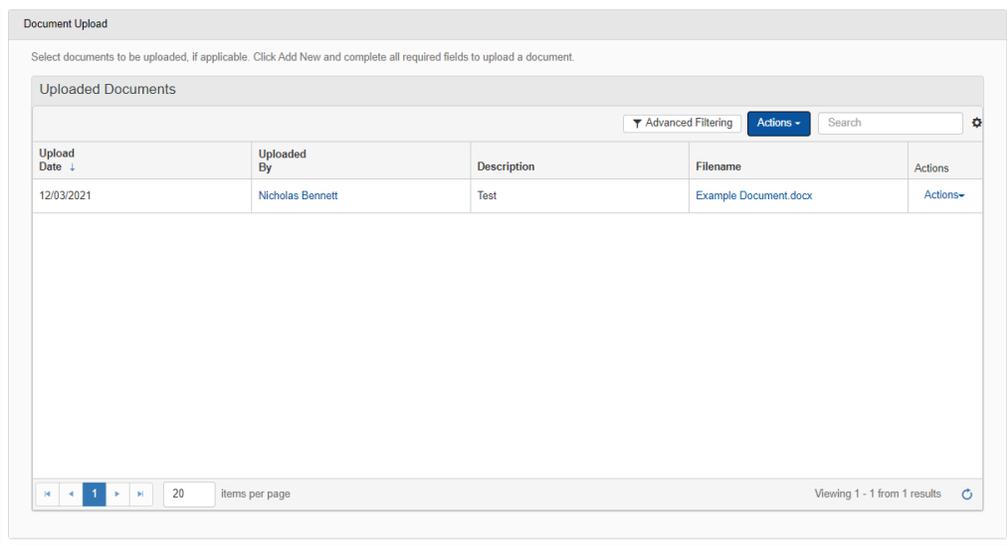
Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Uploaded Documents

Advanced Filtering Actions Search

Upload Date ↓	Uploaded By	Description	Filename	Actions
12/03/2021	Nicholas Bennett	Test	Example Document.docx	Actions→

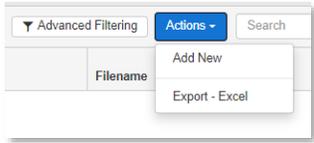
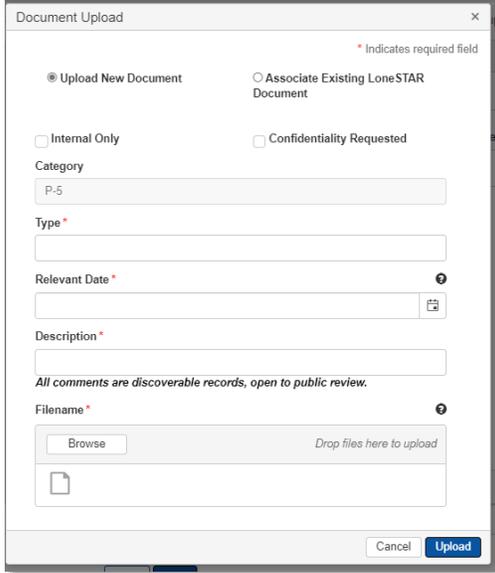
20 items per page Viewing 1 - 1 from 1 results

The screenshot shows a web interface for document uploads. At the top, there's a header 'Document Upload' and a sub-header 'Uploaded Documents'. Below the sub-header is a table with columns for 'Upload Date', 'Uploaded By', 'Description', 'Filename', and 'Actions'. A single row of data is visible, showing a document uploaded on 12/03/2021 by Nicholas Bennett, with the description 'Test' and filename 'Example Document.docx'. The interface also includes a search bar, an 'Advanced Filtering' dropdown, and a pagination control at the bottom showing '20 items per page' and 'Viewing 1 - 1 from 1 results'.

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 Document Upload

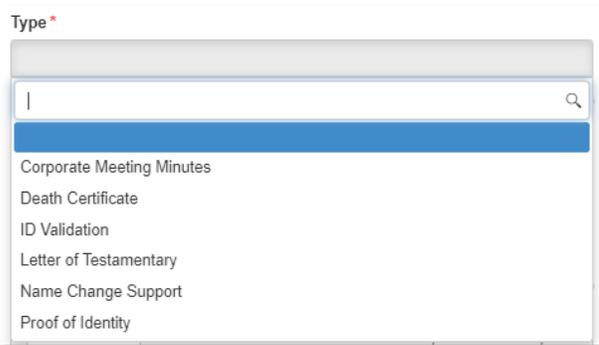
Step	Action	Required Fields
1.	<p>To upload a new document, select the grid-level actions menu and select to Add New.</p> 	
2.	<p>You will be presented with the Document Upload dialog.</p>  <p>“Internal Only” means that the item can only be viewed by Internal Users.</p> <p>“Confidentially Requested” is not available for P-5 filings.</p>	
3.	<p>The user can choose to upload a new document or associate an existing document.</p>	

Upload New Document Associate Existing LoneSTAR Document

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.

4. If you choose to upload a new document, you must select the type of document to be associated to the document. Selecting the Type dropdown displays the possible selections.

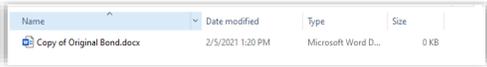
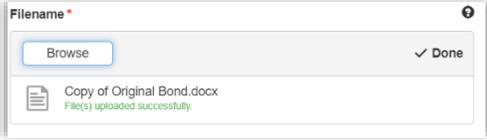


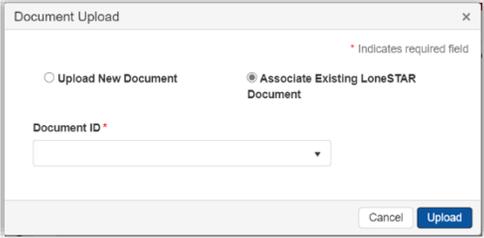
Note:

- If the Purpose for Filing selected was “New”, and the P-5 Officer Listing Grid does not match the Secretary of State Names on File, a document with a Type of “Corporate Meeting Minutes” is required.
- If the Purpose for Filing selected was “Renewal” or “Record-Only”, and all Officers for the Organization are modified, a document with a Type of “Corporate Meeting Minutes” is required.
- If the Officer ID Type selected for any Officer is “Driver’s License” and the ID Country is not “United States of America, a document with a Type of “ID Validation” is required.

5. The Relevant Date and Description fields must be filled out as they are required fields.



6.	<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> 	
7.	<p>Double click the document you would like to upload and the selected document will display in the Document Upload dialog.</p> 	
8.	<p>LoneSTAR will display a message indicating the document was successfully uploaded.</p> 	
9.	<p>Select Upload and the document will now display in the grid and will be associated to the form submission.</p> 	
10.	<p>If instead of uploading a new document, an existing document can be associated.</p>	

		
11.	<p>The Document ID dropdown will display a list of documents that can be associated. Select the desired document and select Upload and the document will now display in the grid and will be associated to the form submission.</p> 	
12.	<p>Select Next to save the uploaded documents and proceed to the next step. Select Save to save the uploaded documents without proceeding to the next step. Selecting Back will return the user to the People Information page.</p>  <p>Note: At this point, this is now considered a form instance in LoneSTAR, and the Form Information step can no longer be edited.</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.

Fees & Payments

Displayed below are current fees and payments for this Organization. You are not required to pay all pending fees. You are only required pay the P-5 Filing Fee & Surcharge fee in order to submit your application. Please note that a payment processing fee will be assessed for each separate electronic payment.

Advanced Filtering Actions ⚙️

N.	Type	Name	Status	Date Paid	Amount	RMS Register Number	Actions
No results to display							

◀ 0 ▶
20 items per page
No results to display ↻

1.6.2 Steps to complete Fees and Payment

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.	In order to make a payment for any required fees, select the row-level actions menu and select "Pay Fee Electronically". 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.	
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.	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.	
6.	The above steps are replicable for all fees in the grid.	
7.	To navigate to the next step, click "Next".	

Back Next Save

1.7 Form Submit and Confirmation Steps

Form Submit

Online Form Association

[Actions](#)

Form ID	Form Category	Title	Description	Actions
---------	---------------	-------	-------------	---------

Comments

[Actions](#)

◀ ◁ 0 ▷ ▶

20 items per page

No results to display

Internal Only?

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

[Add](#)

Acknowledgement

Submitter

Submitter Title *

Date Received *

By typing my name below, I declare under penalties prescribed in Texas Natural Resources Code Sec. 91.143 that I am authorized to complete this application, report, or document, that it 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. *

Form Submit Preview

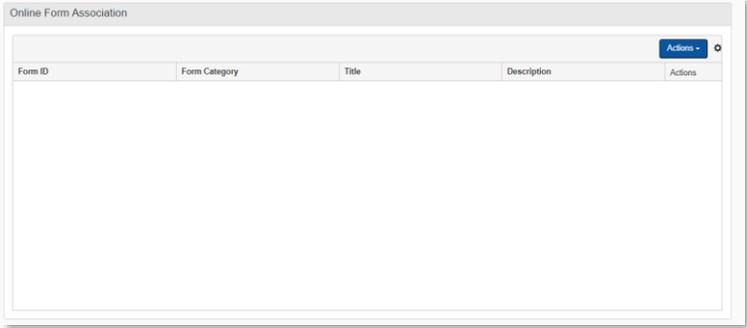
Click the button below to preview your submission summary.

[Preview Submission Summary](#)

1.7.1 Key Points

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

1.7.2 Steps to complete Form Submit

Step	Action	Required Fields
1.	<p>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.</p> 	
2.	<p>To add a comment, enter the text of the comment in the comment textbox and press the Add button.</p> 	
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>	Certification Checkbox
5.	<p>Select Submit to submit the form and proceed to the next step. Select Save to save the form without proceeding to the next step. Selecting Back will return the user to the Fees and Payment page.</p>	



Note:

The Submit button is deactivated until all required fields are completed on this step.

It is necessary for the user to visit the people step in order to prepopulate existing data before submission.

6.

When the form is submitted, the Confirmation message will be displayed to indicate the form has been submitted and the workflow processing has begun.

Note:

- 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 Create Correspondence Step

1.8.1 Key Points

- Learn how to complete the Create Correspondence Step.

The screenshot shows a web form titled "Create Correspondence". At the top, it asks "Create Correspondence?" with radio buttons for "Yes" (selected) and "No". A legend indicates that an asterisk (*) denotes a required field. The form contains several input fields: "Correspondence Type", "Subject *", "Signatory Name *", "Signatory Department *", "Description *", and "Correspondence Text *". There are also two columns of dropdown menus labeled "CC Organizations" and "CC People". At the top of the form area, there are checkboxes for "Send via Certified Mail?" and "Ready to Send?". A "Preview" link is located at the bottom left of the form area.

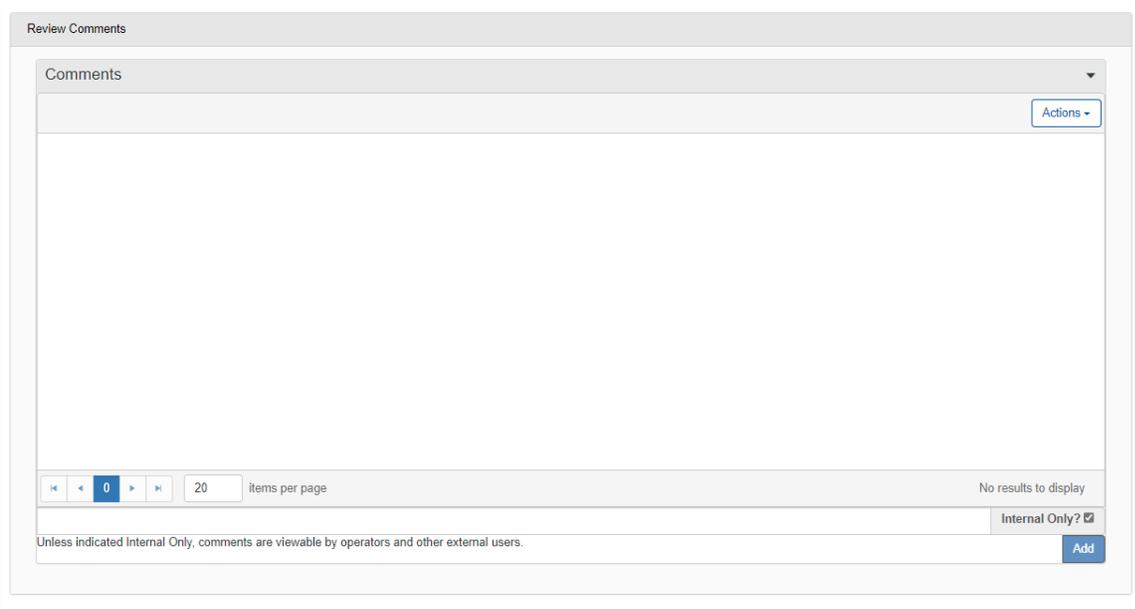
1.8.2 Steps to complete the Create Correspondence Step

Step	Action	Required Fields
1.	Select the "Review" tab under Form Detail Navigation.	
2.	For the purpose of this guide, choose to Create Correspondence.	Create Correspondence
3.	Choose not to Send via Certified Mail.	

4.	Select the Correspondence Type dropdown to be General.	
4.	Complete the Subject line to be "Financial Assurance Correspondence"	Subject
6.	Complete the Signatory Name field as your preferred name.	Signatory Name
7.	For the purpose of this example, do not select to CC any additional organizations.	
8.	From the Signatory Department dropdown, select "P-5 Financial Assurance Unit".	Signatory Department
9.	For the purpose of this example, do not select to CC any additional people.	
10.	Enter description to be able to identify this document at a later time. Note: 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.	Description
11.	Complete the Correspondence Text field with the desired text to be sent to the Organization as the body of the text.	Correspondence Text
12.	Navigate back to the top of the step, select the Ready to Send? Checkbox. Note: If this is not selected, the correspondence will not be sent.	
13.	Select the Preview link, this will download a PDF copy of what the correspondence will look like when sent.	

	Note: The user must select “Save”, before selecting Preview.	
14.	To navigate to the next step, select “Next”. 	

1.9 Review Comments Step

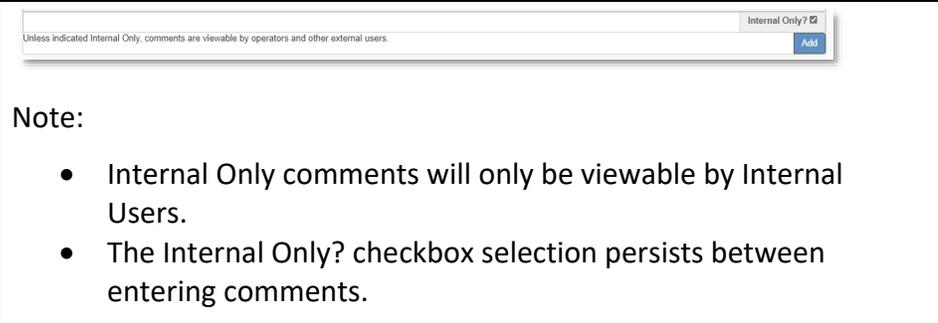


1.9.1 Key Points

- Learn how to complete the Review Comments Step.

1.9.2 Steps to Review Comments.

Step	Action	Required Fields
1.	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.	
2.	To add a comment, enter the text of the comment in the comment textbox, select Internal Only? checkbox, and press the Add button.	

	 <p>Unless indicated Internal Only, comments are viewable by operators and other external users.</p> <p>Internal Only? <input checked="" type="checkbox"/></p> <p>Add</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.	
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.	
4.	Select the Next button to proceed to the next step.	

1.10 Review Step

Task Name	Workgroup	Assigned To	Created	Last Updated	Review Status	Actions
Review Renewal P-5 Organization Report Filing	P-5 Manual Review		12/03/2021 01:19 PM	12/03/2021 01:19 PM		Actions

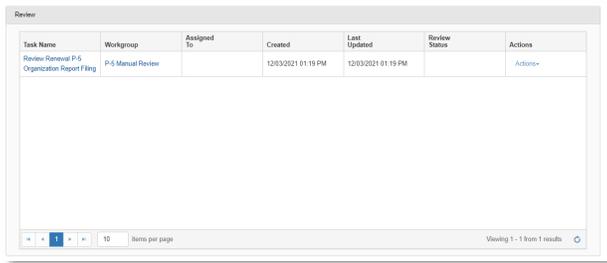
10 items per page Viewing 1 - 1 from 1 results

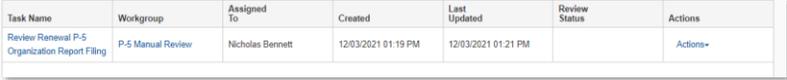
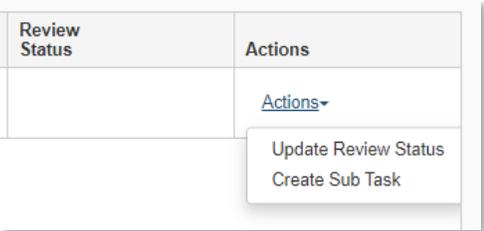
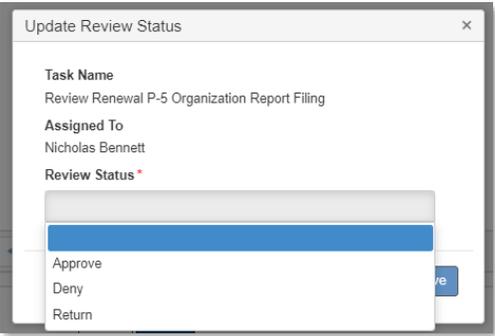
1.10.1 Key Points

- Learn how to complete the Review Comments step

1.10.2 Steps to complete the Review

Step	Action	Required Fields
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.	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.	Assigned To, Due Date
4.	Now that the task is assigned to you, you can select the Actions dropdown to disposition the review task.	



		
<p>5.</p>	<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> 	
<p>6.</p>	<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> 	<p>Review Status</p>
<p>7.</p>	<p>Workflow processing will begin, and you will be notified that you can refresh the page to view the updated status.</p> 	
<p>8.</p>	<p>Continue the process for the Managerial Workgroup Review task.</p>	
<p>9.</p>	<p>When workflow processing is complete, the P-5 will be renewed.</p>	