Hello and welcome to the updating existing cases demonstration. My name is Rick Selbach. I'm the Data Administrator at the BLM Arizona state office. I've been instructing on LR2000 ever since it was first deployed back in 1999.

And I'm Joe Malys, a Data Analyst with the Arizona state office. I've held several positions with the BLM where I utilized LR2000 both to gain information from the system and enter information into the system.

This lesson will demonstrate some of the common changes that need to be done when updating existing cases in the case recordation data base. So often we forget to make routine changes in LR2000 as our cases move from pending, to authorized, and eventually to a closed disposition. It's vital that we make these changes so that at any given point in time LR2000 will reflect the most current status of the case possible. Remember, it's not just you who is looking at this information. Other specialists at the field office, district office, state office or Washington office, as well as other agencies and members of the public may be looking at this information.

Now that you know why making these updates to existing cases is important, let's take a look at the topics we will be covering. First, we'll show you how to "700" lands in the location details; then we'll demonstrate how to make changes in the customer details.

Next, we'll demonstrate how to make alpha ties between action remarks and general remarks and lastly we demonstrate how to update actions relating to future action dates. Let's get started.

The first thing we want to talk about is how to "700" lands. Legal descriptions that have ever been involved in the case need to remain as part of the record. In other words, we don't just delete them from the case. We use what we refer to as "sevening out the lands" or "700 lands" to isolate them from the rest of the record. On your screen you can see an exchange case. If I scroll down to the location details, you can see that we had 13 lines of legal description in this case. Let's say that all these lands were segregated as part of the exchange, but for whatever reason, section 2 did not go and was not patented. To show that those lands are not patented but were part of the record originally, what we do is go into the section field and we change the first character to a 7. That's why we refer to it as 700 lands. It almost appears as if it's section 702. Well what this will do will make the lands appear differently on a serial register page. So I've changed both the first digits on both of the first lines of legal description, and then I will hit a save and exit and that's it.

Rick just showed us how to "700" out lands that have dropped out of our case. Having said that, that means our acreage our total acreage for the case will now change. We need to go up into the header details and update the header details for case acres. We know that the north half of the southeast and lots 5-10 of section 2 were “700ed out. So we’ll need to reduce our total acreage by 244.88 acres, and now put in the correct acreage figure. Once we do that, we save it back to the case, and we’re good to go. Now that the case has been consummated and a patent has been issued, we now will need to change the interest relationship of our customer. We’ll update our customer details and change the interest relationship from applicant 01 to patentee 30. You can also use the look up field to choose a variety of codes to utilize. We now save our case.

Now that we’ve made our updates, let’s take a look at how this data appears on the serial register page. Here is our serial register page. You can see that we’ve updated our total case acres, our interest relationship has been changed to patentee and as we scroll down and look at the legal descriptions; you can see the one that we “7ed” out are now under a heading called relinquished / withdrawn lands. In other words, they’re still part of the record, but they are no longer part of the actual case. And so when we look at this, we know that these lands up here have been patented, but these ones underneath are not. Now let’s take a look at creating alpha ties between action remarks and general remarks.

The data element for case recordation action codes states when to use alpha ties, both when they’re mandatory and when they are optional. For example, it’s optional to use alpha ties on action code 362 - decision affirmed and action code 366 - decision reversed and remanded. This case that we’re looking at here is an oil and gas case, and it has action code 536 - royalty rate other. The data element for case recordation action code states that it's mandatory to use the alpha tie for action code 536. What it says is in action remarks enter new royalty rate and semicolon followed by an alpha indicator to identify previous royalty rate. In general remarks, tie with the same alpha indicator and enter old royalty rate and dates rate was effective. So you can see here that our current rate is 18 2/3%. Here's our little alpha tie and down in our general remarks, our same alpha tie telling us that it used to be 12.5% from December 1, 2000 to December 1, 2005. Our alpha ties know that our action here ties with our remark here.

Most dates in LR2000 are in the past. They reflect actions that have already occurred such as a right-of-way being granted or a patent being issued. However, there are a few action codes that should have future dates. Let's take a look at those.

The following action codes will actually help you manage your case work load. Action codes such as 097 – next billing date, action code 853 – compliance or review due date, action code 763 – expires, that's when the case is due to expire, and action code 247 – future action suspense. It's kind of a generic one that you can use whenever you need to. So let's take a look at a case where some of these action codes have been used.

Here we have a right-of-way, and this case has several instances of those future action codes. The first one we have is action code 853 – compliance or review due date. In our example here, our compliance was due November 30, 1991. Now of course that is in the past from today. What should've happened is if we went out and did our compliance, we'd go in and put that s a new code and let's say we'll do that. Go in and insert a new line, and we'll use the date of December 1, 1991, and we're going to say it was in compliance, which is action code 950. Now again, you can always use your look up feature to pick it. Compliance approved on that date and I'm going to do a save and continue. Now of course we don't want to keep in the old 853 compliance review due date on that day because we actually did compliance. So what you would want to do is just change the date on this to the next compliance review. We could change it, keep it November 30th and maybe we would've added 10 years or 20 years or whatever it is based on the schedule of when it needs to be done. I'll change it into 2011 and again do a save and continue. Now you notice that when we had our action code 853, over here we had a pending office code. In this instance, it's our Hassayampa Field Office; they're the ones who are in charge of this right of way. Any time you have a future action code you should have who that case is pending to. This office is the one who is going to do the compliance review on it, and by using those you can always run reports to say what actions do I have pending my office. The next future action code we see in this case is action code 247, our generic future action suspense, and what this person did was enter expires 11/29/2011. What they are saying is they were putting in a little heads up reminder to themselves. You can call it maybe a “tickler” to say that this case is due to expire. You can see that the next action code in the case is the 763 – expires. So basically 4 months before this case was due to expire, they put in a little reminder to themselves. That gives them some leave time to contact the holder of the right-of-way, find out if they want to do a renewal and just basically it’s some prep time for them. Again, if this right-of-way was actually renewed then this action code would be changed with a new future date to show when for the new expiration “tickler”. For this example we’re going to say that the holder of the right-of-way decided that they didn’t want it anymore. So, what we need to do is remove our future action suspense code to get rid of it. To do it, all you do is put a little check mark in the radio box for that action code and here we’ll do a save and continue. Of course if we’re getting rid of it we also don’t need to have that compliance review that we added. We’ll do that one as well. It confirms that we want to delete those actions and we hit okay. Now the other thing that we do need to do if they’ve decided that they don’t want it anymore and it has actually expired on its own, is we need to remove the expires code. The easiest way to do that is instead of just deleting it we have to say that the case has expired. So what we would do is change the action code from 763 – expires to 234, which actually means “expired with a D”. Now the case has an expired disposition. Now we don’t want to leave cases in an interim disposition forever. We don’t want this case to always reflect expired. So we also need to close the case and if we’ve done everything that we need to do, we’ll add action code 970 to show case closed, but also remember we mentioned pending organization codes. If this case expired on its own, remember we changed it from expires to expired we don't need this pending organization code anymore. So please remember to go in and remove pending organization codes when you don't need them anymore. Just go in; hit delete. In this case we're going to go ahead and add our additional line, showing that we closed it, add action code 970 and this time I'm going to hit save and exit, and you can now see that our case disposition is closed and we've removed all of our future action codes and our pending organization codes. These pending action codes are very useful in helping you manage your case workload. You can run reports such as the case recordation case action information report for a particular timeframe for these action codes, and that'll help you know what's coming due. Now that we've discussed future action codes, let's review what you've seen in this demonstration.

We demonstrated some of the common changes that need to be performed when updating existing cases in the case recordation database. We accomplished this by covering the following topics.

First, we demonstrated how to 700 lands in the location details. Remember, legal descriptions must remain in the case; don't just delete them. Place a 7 in the first position of the section to show that the legal description was once part of the case, but is no longer involved. We also demonstrated how to make changes in customer details. Remember to change the interest relationship of your customer when the case is authorized.

We also demonstrated how to make alpha ties between action remarks and general remarks. The data element for case recordation action codes in the Corporate Meta-Data Repository describes when these ties are mandatory and when they're optional. Please refer to Demonstration 1 for help on accessing the CMR. Lastly, we demonstrated how to update actions relating to future action dates. Please remember once the action has occurred in the case, you need to go into the case and update the information. As an example, when you're done with your compliance exam you need to update the case to not only show that the compliance was done, but you also need to change the date for the next due date on the next compliance.

In conclusion, please remember the information in LR2000 is only current if you keep it up to date. It is vital to make changes to your case as it moves through its life cycle. Thank you for keeping LR2000 current.