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BUREAU OF LAND MANAGEMENT
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Instruction Memorandum No. 2003-009
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To: All Field Officials

From: Assistant Director, Minerals, Realty and Resource Protection

Subject: Automated Fluid Minerals Support System Policy for Data Entry, and
Maintenance of Customer Information

Program Area: Fluid Minerals Operations

Purpose: This Instruction Memorandum (IM) provides instruction to ensure accurate, reliable
data in the Automated Fluid Minerals Support System (AFMSS). This policy for data entry, and
for maintenance of existing data, ensures that AFMSS contains reliable data that conforms to
standards and consistency on a national basis.

Policy/Action: Attachment1 provides consistency in the entry of customer (Operator)
information into AFMSS. All AFMSS users who have the capability of adding new customers
to the system must follow the standards and conventions, outlined in the attachment for the
format of Customer names.

It also outlines the correct usage of the Replace Operator and the Operator Change features in
AFMSS. The Replace Operator feature is used when an operator name has been incorrectly
entered into the system. The Operator Change option is used when there has been an actual
change of operator. This IM outlines the differences between the options and their correct usage.

Timeframe: All Field Offices (FO=s) are required to implement the attached requirements upon
receipt and to develop oversight procedures to ensure that these requirements are implemented.

Budget Impact: These data entry standards, and implementation of oversight procedures, will
be accomplished within existing funding.

Background: AFMSS was implemented nationally in October 1997. The AFMSS Project has systematically been providing formal guidance to FO=s outlining system documentation policy by subject area as needed. Formal documentation requirements for the Inspection and Enforcement Program have been developed. The AFMSS Project is now developing formal policy guidelines to cover the multiple operational segments of the system. With the successful development and implementation of electronic commerce permitting in AFMSS, it is imperative that FO=s be given consistent guidance.

Manual/Handbook: The attached policy will be incorporated in the electronic AFMSS User Guide set of appendices.

Coordination: Coordination between each State Office and its FO=s is necessary to ensure that everyone who enters data into AFMSS implements these documentation requirements.

Contact: Direct any questions regarding AFMSS to Paul Brown at (303) 236-8586, Patty Ramstetter at (801) 539-4048 or Carol Larson at (406) 233-3655.

Signed by: Authenticated by:

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Minerals, Realty and Resource Protection

1 Attachment
  1 - Policy for Data Entry and Maintenance of Customer Information (6 pp)

AFMSS POLICY FOR
DATA ENTRY AND MAINTENANCE OF CUSTOMER INFORMATION

The following rules are adopted in an effort to provide consistency in the entry and maintenance of customer (Operator) information in AFMSS. All users who have the capability of entering or maintaining customer information must be aware of these rules.   AFMSS currently contains consistent Tribal, Surface Management Entity, and BLM Office names, therefore these rules will pertain primarily to the addition of oil and gas operators.

This policy paper is separated into two main subject areas:

$ How to appropriately enter customer information; and
$ How to maintain those records by using the Operator Change and/or Replace Operator
         features in AFMSS.

Case recordation guidelines for abbreviating name and address information were used in developing this policy. AFMSS standards are consistent with the Case Recordation policy, with the following exception: Naming standards in the outdated Automated Inspection Records System (which we used to populate AFMSS) required that operator names always be spelled out completely if there was room in the data field, while Case Recordation standards require that the words Company, Corporation, Incorporated, Limited Partnership, Department, and State names be abbreviated.   At this time, AFMSS users <u>will not</u> be required to edit all of the existing customer names in the system to meet the Case Recordation standard. However, entry of new customer names should be consistent with national Case recordation policy.

I.   RULES FOR ENTERING AFMSS CUSTOMER NAMES

         The rules regarding the entry of customer names are:

         $ Use the Customer pick list to see if the customer is currently in the data base.
                  From the Main Menu, select Operations and then Customers. Query the
                  Customer Select (GLB.11) screen using a portion of the customer name and the
                  wildcard characters (%) as appropriate (i.e., %JONES%). If the customer is
                  displayed in your query, select the standardized name. If the customer name does
                  not exist, select the Maintenance button on the Customer Select screen. Enter the
                  customer information in accordance with the conventions and standards outlined
                  in these rules in the Customer Maintenance (GLB.12) screen. Save the record.

         $ Each customer should have one standard <u>active</u> name in the system that has an
                  Organization (Customer) Type of AApproved BLM Operator@ (APR). All
                  records should be tied to the active APR. If the operator is listed under an
                  Organization Type other than APR, either change or copy the record and select
                  APR. Other Organization types are available for use for informational purposes
                  and should use the standard operator name as the customer.

$ Standardized names should be used consistently within State boundaries. Oil and gas companies that operate in more than one State should be entered as consistently as possible as this is very important for electronic commerce. Operators should not have to contend with different naming conventions depending on the State or Field Office in which they file an electronic permit. If the following rules are applied consistently, then standardizing names will not be a huge workload. A sample listing of operators who have activity in more than one State is included in Attachment 1-6.

A.   <u>ENTRY CONVENTIONS</u>:

     $ Remove punctuation such as apostrophes, hyphens, commas, periods, etc.

     $ Use the ampersand (&) to represent the word ∧and≅ (i.e., COASTAL OIL & GAS COMPANY).

     $ Include SR, JR, II, III, etc., at the end of the name if applicable.

     $ Names beginning with US or U S -- In order to distinguish between Federal Government Agencies and private companies or corporations, they are to be entered as follows:
         Federal Agencies -- Enter as US (no spaces).
         Companies/Corporations -- Enter as U S (space).

     $ Names beginning with a number or numeric character are entered numerically. For example: 5B OIL & GAS COMPANY or 7D LIMITED PARTNERSHIPS.

B.   <u>NAME SEQUENCE</u>

     $ For individuals or individual trusts, estates and partnerships -- Enter the Last Name, First Name, Middle Initial with no punctuation, followed, if applicable, by the word Trust, Trustee, Estate, or Partnership.

     $ For incorporated or group trusts -- Enter First Name, Middle Initial, Last Name with no punctuation, followed if applicable, by the word Trust, Trustee, Estate, or Partnership.

     $ For companies or corporations -- Enter the name in the normal sequence with no punctuation; e.g., ROBERT DOLLAR CORPORATION. When the official name of the operation includes the words ∧THE≅ or ∧COMPANY,≅ they should be entered.

C. ABBREVIATIONS

$ DO NOT abbreviate for the sake of abbreviation. Only abbreviate when a name exceeds the 30-character customer name field.

$ Avoid abbreviating short words of five characters or less.

$ Remember to use the A&@ sign in place of the word Aand.@

$ When a name exceeds the 30-character limit, start abbreviating with the last word of the name. Always spell out the first word of the name unless the name begins with >INTERNATIONAL,= >CONTINENTAL,= >INTERCONTINENTAL,= OR >INTERMOUNTAIN.=

$ Use the list of standard abbreviations provided in the Corporate Data Dictionary if you have to abbreviate a customer name. The Corporate Data Dictionary can be reviewed by accessing the NIRMC Intranet Data home page, or is also available from the LR2000 system.

D. COMMON ERRORS

Several common errors are listed below; the correct Customer Name entries are shown to the right.

Incorrect	Correct
AMERICAN HUNTER EXPLOR. LTD.	AMERICAN HUNTER EXPL LTD
ENRON OIL AND GAS CO.	ENRON OIL & GAS COMPANY
GEORGE A. VINCENT, JR.	VINCENT GEORGE A JR
HAYNIE OIL, INC	HAYNIE OIL INCORPORATED
VINCE ALLEN AND ASSOCIATES	VINCE ALLEN & ASSOCIATES
W M GALLOWAY	GALLOWAY W M
3G, INC.	3G INCORPORATED
US OIL COMPANY	U S OIL COMPANY

II. **MAINTAINING OPERATOR INFORMATION**

REPLACE OPERATOR versus OPERATOR CHANGE POLICY

The objective of this policy is to outline the correct usage of the Replace Operator and the Operator Change functions in AFMSS. Both of these features are located under the AAA@ category on the AFMSS Main Menu.

A.   OPERATOR CHANGE (GLB.72)

When an operator change (successor of operator) occurs on a case and/or specific wells(s), use the Operator Change feature. Regardless of whether an operator takes over an entire field or a single well on a case, the Operator Change feature is the method of documenting the change. The Operator Change function is also used in the event of company mergers (i.e., Exxon Corporation and Mobil Oil Corporation to ExxonMobil Corporation). To conduct an operator change, select AA from the AFMSS Main Menu. Highlight the Operator Change listing from the cascading menu. This launches the Block Operator Move (GLB.72) screen and displays cases, wells, facilities and other records, if any, that need to move to the new operator name. You must provide an effective date for the operator change. For step-by-step procedures for the Block Operator Move screen, refer to Section 5.12 of the Application Administrations Manual (AAM) located in the Help feature in AFMSS.

The Operator Change feature:

$ Ties existing case, well, and facility records that the user highlights to the new operator.

$ Allows the user to link individual wells/facilities to a new operator while leaving other wells/facilities linked to the old operator on a case.

$ Keeps an historical record of all operators for a case and well(s) in the system so that the user can identify who operated the well over a given timeframe or its complete life cycle.

$ If applicable, allows the user to move existing inspection information to the new operator. Historical inspection information will remain with the old operator. However, if an operator change occurs in the middle of a production inspection, for example, then the open inspection may be moved to the new operator. Moving inspection information will be determined on a case-by-case basis.

$ Requires that a new priority record be added for the new case/operator. Ensure that the categories on the inspection priority record for the new operator are correct. Special attention should be directed to the operator compliance rating, overall status, and inspection status code. You may also wish to update the average monthly oil and gas volumes for the new record, since that information will not transfer to the new record.

B.   REPLACE OPERATOR (MNT.30)

As stated on the Replace Operator window, this feature shall only be used when an operator name has been incorrectly entered into the system and you want to edit the information so that it reflects the appropriate operator name (i.e., the name was inadvertently misspelled or unnecessary punctuation was initially entered). It should <u>not</u> be used when recording a regular operator change on cases/wells during their life cycle. Again, it is only used to edit data entered incorrectly or those names that need to be changed to meet the standardized format outlined in this policy guide. Make sure that this is the applicable procedure before starting, as it will change all records and eliminate any history of the current operator name. For step-by-step procedures when using Replace Operator, refer to Section 5.14 of the AAM located in the Help feature in AFMSS.

The Replace Operator feature:

$ Replaces <u>all</u> current operator information with the corrected operator name for <u>every</u> record in the system linked to the current operator (even historical records). If an optional case number is provided, just the records tied to that case will be changed.

$ Eliminates <u>all</u> historical operator information for a case or well by overwriting the old operator information with the new. Thus, it erases the old operator information as if it had never existed.

EXAMPLES OF CUSTOMERS WHO OPERATE IN MORE THAN ONE STATE:

AMOCO PRODUCTION COMPANY
ANADARKO PETROLEUM CORPORATION
ARCO OIL & GAS COMPANY
AVIARA ENERGY CORPORATION
BALLARD PETROLEUM LLC
BARRETT RESOURCES CORPORATION
BEARTOOTH OIL & GAS COMPANY
BHP PETROLEUM INCORPORATED
BTA OIL PRODUCERS
BURLINGTON RESOURCES O&G CO
CHANDLER & ASSOCIATES LLC
CHEVRONTEXACO INCORPORATED
CITATION OIL & GAS CORPORATION
COASTAL OIL & GAS CORPORATION
CONOCO INCORPORATED
EL PASO PRODUCTION OIL & GAS CO
EQUITABLE RESOURCES ENERGY CO
EXXONMOBIL CORPORATION
FLYING J EXPL & PROD INC
FLYING J OIL & GAS INCORPORATED
INLAND PRODUCTION COMPANY
HALLWOOD PETROLEUM INC
HUNT OIL COMPANY
JN EXPLORATION & PRODUCTION LP
LONE MOUNTAIN PRODUCTION CO
MARATHON OIL COMPANY
MCCULLISS RESOURCES CO INC
NORTHSTAR GAS COMPANY INC
PHILLIPS PETROLEUM COMPANY
QUESTAR PIPELINE COMPANY
QUESTAR EXPL & PROD COMPANY
RIVER GAS CORPORATION
ROSEWOOD RESOURCES INC
SANTA FE SNYDER CORPORATION
SHELL OIL COMPANY
TEXACO EXPLORATION & PROD INC
TOM BROWN INCORPORATED
UNION PACIFIC RESOURCES CO
YATES PETROLEUM CORPORATION