**Video 3**: **Create a Courtesy Statement (CS) in LRAM**

**Slide 1: Create a Courtesy Statement (CS) in LRAM for Processing Fees**

**Slide 2**: The “Processing Fee” must be received in a BLM office before processing an application, unless the applicant is exempt from paying cost recovery fees. You can create a Courtesy Statement to bill for the “Processing Fee” in LRAM.

**Slide 3**: The purpose of this video is to provide users with a step-by-step guide to create the billing data for courtesy billings for “Processing Fees” Categories 1 -4.

**Slide 4:** In this video, we will use the record we created in the previous video (Create a New Authorization Record) to prepare the “Billing Schedule” for the Courtesy Statement.

**Slide 5: Demonstration: Navigation**

Log into LRAM

“Log” into LRAM through the BLM Application Security System (BASS): <https://web.bass.blm.doi.net:8601/bass2/login.do?dispatch=preparePage>

Enter you network user login and password.

Select the appropriate LRAM application – UAS-LRAM Production or UAS-LRAM Training

LRAM Production is the “live” system – LRAM Training is the “practice” system

Select “continue” to get into the system.

Check the “Admin Office” to make sure you’re working in the correct office.

-on the main menu, hover over the “Authorizations” button.

-you will see a “dropdown”, click on “Authorization Search”.

-Enter the “Serial #” and click “Search”.

-The “Serial #”, “Case Type” and “Customer” will show in the “grid”.

-Click the “Edit Pencil” icon or the “Serial #” to access the “Authorization Summary” screen.

**Slide 6:** To create a Courtesy Statement for the processing fee, you must have an “Effective” date and an “Expiration” date.

However, the Authorization has not been issued yet so LR2000 will not have these dates. You will need to enter an *expected* “Effective” date (an estimate of the date the authorization will be issued) and the *expected* “Expiration” date based on the term of the authorization. When the authorization is issued, the “Effective” date may have to be changed to reflect actual date issued. Generally, the “Expiration” date will not be affected but if it is enter the new “Expiration” date.

To enter the “Effective” date and the ‘Expiration” date, click the “Serial #” on the “Authorization Summary” screen. The “Serial #” is blue and underlined indicating it is hyperlinked.

-Enter the *expected* “Effective” date and the *expected* “Expiration” date.

-Click the “Update” button and then click “Cancel” and you’ll go back to the “Authorization Summary” screen.

On the “Authorization Summary” screen, click the top “New Schedule” button and the “Authorization Schedule” screen will appear.

On this screen, the “Begin” and “End” dates must be a year apart. (This is not the “Billing Period”)

You will need to select the applicable “Rate Information”:

- Is the “Rate” determined by “Formal Appraisal”, the “Linear Schedule” or the “ROW Site Schedule” (aka “Small Site schedule”)?

- Select the appropriate “Rate” (when selecting “Formal Appraisal” or “ROW Site Schedule” enter the other information).

- For our demonstration, we will select “Linear Schedule”. Click “Create”.

The “Authorization Summary” screen will appear so click on the “Edit” pencil or “Schedule #” in the “Billing Schedule Info” grid.

- Click on the “Delete” (trashcan icon) in the “Basic Schedule” grid. A pop up will appear asking for confirmation to delete the “Basic Schedule”. Click OK.

-Click the “New Fee” button (lower right side of screen)

-On the “Fee” screen, click the down arrow on the “Fee Type” and select the appropriate Category. For our demonstration, we will select Processing Fee Category 4.

FYI: The “Schedule Amount” is “hard-coded” for Category 1-4.

Remember, the “Note” field is free form - not required – will not print on bill.

-Click the “Create” button – the “Billing Schedule” screen will appear.

-Check to make sure the correct Processing Fee shows on the grid.

Click “Calculate.” Always click “Calculate”; this will help you identify any errors that do not pass the system edits based on business rules.

Now you’ve created the processing fee billing data so we’ll process the data to interface to CBS.

Hover over the “Billing” button (upper left side of the screen)

- Select “Courtesy Bill Selection”.

- Enter the “Serial #” and click “Search” – the “grid” will show the “Serial #” selected.

Click the “check box” and click the “Preview” button if you want to view the billing data before you process it.

What to review the “Total Due” amount

(FYI: Even though there is a “Due Date”, it is not applicable for Courtesy Statements.)

Billee and address

The description of what is billed.

If you previewed the Courtesy Statement, close the “Tab” by clicking on the “X” (in the upper right corner of the screen) and the “Courtesy Bill Selection” screen will appear.

If all the data is correct, click the “Process” button to interface the billing data to CBS.

The “Bill Register” will appear.

The grid will show the “LRAM Bill #” and the “CBS Bill Status”. If you see any status other than a “CBS Bill #” or “Reject”, click the “Refresh” button. The system may show multiple statuses instead of the “CBS Bill #”. Keep clicking the “Refresh” button about every 30 seconds until the “CBS Bill #” appears.

Once the “CBS Bill #” appears, the data is sent to CBS.

**Slide 7: Conclusion**

The purpose of this video was to show you how to create the Courtesy Statement billing data for the “Processing Fee” and how to process (interface) the billing data to CBS for printing.

Now that you know how to create and process the Courtesy Statement for “Processing Fees”, I’ll show you how to create and process a Courtesy Statement for the “Monitoring Fee” and “Initial Rent”.