**Video 4** Create a Courtesy Statement(CS) in LRAM for Initial Rent and Monitoring Fee

**Slide 1: Create a Courtesy Statement (CS) in LRAM for Initial Rent and Monitoring Fee**

**Slide 2**: The “Initial Rent” and “Monitoring Fee” must be received in a BLM office before the Authorization is issued, unless the applicant is exempt from paying cost recovery fees or rent.

**Slide 3**: The purpose of this video is to provide users with a step-by-step guide to create the Courtesy Statement billing data for “initial rent” and “monitoring fees”.

**Slide 4**: In this video, we will use the record we created in the previous video (Create a New Authorization Record) to prepare the “Schedules” 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:** When creating a “Courtesy Statement” for the initial rent, 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 does; enter the new “Expiration” date.

Click the “Serial Number” on the “Authorization Summary” screen.

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

-Click the “Update” button.

-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.

-Enter the “Begin” and “End” dates

(These dates must be a year apart but 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) and click “Create”.

The “Authorization Summary” screen will appear. Click the “Edit” “pencil icon” or “Schedule #” in the “Billing Schedule Info” “grid”.

The “Billing Schedule” screen will appear. Click the “Edit” “pencil icon” in the “Basic Schedule” “grid”.

Change the “Begin” & “End” dates for the appropriate “Billing Period”.

Remember the “business rules” for determining “Billing Periods”.

Click “Update” and the data is updated.

The “Billing Schedule” screen will appear.

While you’re in the “Billing Schedule” screen, you can bill for the “Monitoring Fee” on the same bill as the “Initial Rent”.

-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.

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 “Monitoring Fee Category” 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 billing data for the initial rent and the monitoring fee so we’ll process the data to interface to CBS.

Hover over the “Billing” button and select “Courtesy Bill Selection”.

Enter the “Serial #” and click “Search”

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 preview the billing data, close the “Tab” by clicking on the red “X” (in the upper right corner) 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 “Initial Rent” and Monitoring Fees” and how to process (send) the billing data to CBS for printing.

Now that you know how to create and process the Courtesy Statement I’ll show you how to create and process an “Accounts Receivable” for subsequent rent.