

Hello my name is Emma Green. I am a land and resources information systems specialist at the Idaho state office and I teach LR2000 classes throughout the Bureau. I have worked at the Idaho state office since 1976 and I've been involved in the automated land records project since its inception.

The collection and billing system, or CBS, is used to perform a variety of collection and billing functions. Prior to the implementation of CBS, money was received by the accounting staff who then notified the lands or mineral staff of the receipt, including the date amount serial number for which it was intended. This could include right-of-way rentals, processing fees and moneys collected for the sale of mineral materials to name a few. The lands and minerals staff would then manually enter that information into LR2000 in either the case recordation or mining claims databases. With the implementation of CBS, many of the transactions that were manually entered are now programmatically entered using an interface process. If for some reason the interface is not successful, then the transaction is rejected and must be corrected by the CBS staff.

The purpose of this demonstration is to help resolve errors that are created during the CBS LR2000 interface process. This lesson will demonstrate how to research errors for the cases from the case recordation database only and not the mining claims database. We will discuss the differences between the terminology in CBS versus LR2000. We will also research an error using the

case recordation database in conjunction with CBS and also using CBS reports. We will determine the correction that needs to be made.

Probably the most important thing you can do to keep errors to minimum is to have an open line of communication between those who are receipting the moneys and the lands and minerals staff who request moneys and maintain the LR2000 records. For instance, if you have requested money from a member of the public, make sure to notify those receipting the money into what account or accounts the money should be placed, the customer's name, the amount expected, and the serial number of the case. There are edits built into the CBS process that will flag potential errors; however, those error messages can be overridden by the CBS staff. If the CBS staff member is not able to determine the corrective action and cannot reach a resource specialist to resolve the issue, the override enables them to continue the process throughout the transaction. If these edits are bypassed then the transaction will cause an error during the interface process and must be resolved later. Click on the attached document for a detailed guide of the process.

The terminology CBS uses differs from LR2000 in many ways. It is important that you become familiar with each other's terms so that monies can be receipted correctly. For instance, LR2000 uses the term serial number to refer to the case file number while CBS calls it an authorization number. Another example that

CBS uses is commodity, subject and action, or CSA, and BLM uses case types and action codes.

In the illustration shown here, when a member of the public purchases mineral materials from a community pit, the pit the sale is entered into CBS with a commodity of mineral materials; this limits the drop down menu in CBS to a set of subjects related to that commodity. In this case PD, or public domain, mineral material non-exclusive sale is selected. This further limits the choices within the action drop down menu to those associated with the chosen subject. In our example, the actions are sand and gravel, cubic yards, and PD reclamation fee. During the interface process, these items are compared with the case type associated with the serial number. If these match then the CBS action for the material converts to four action codes in case recordation. PD reclamation fee converts to action code 540 – reclamation fee in case recordation.

One of the most common errors made is when a non-exclusive sale from a community pit or common use area is entered into CBS as a PD mineral material competitive non-competitive sale or vice versa. If the interface process detects that the CSA is for a non-competitive sale, but the LR2000 case type is for a non-exclusive sale, then the transaction will be rejected. You will note that for the non-exclusive sale, LR2000 is populated with 5 action codes, but for a competitive or non-competitive sale, 1 action code is created. The best way to reduce the possibility of this happening is by following the 3600 mineral material

handbook direction to provide the front desk staff with a list of community pits and common use areas in each office as described in chapter 13 E.2.B which states, "Mineral personal must provide the front desk person a data sheet on an annual basis for each CP or CUA for sales that would occur from that office. The data sheet will include at a minimum: serial numbers for the CP or CUA, the mineral materials commodity unit price, and the measures of unit, cubic yard or ton, reclamation costs and other applicable fees per unit. Other documents for example, stipulations and maps, may be included." We also suggest that you include the geographic name, commodity, county and disposition.

There are two ways to research CBS and LR2000 interface errors. One is through LR2000 transaction processing screens and the other is through CBS reports. First, we will discuss how to use the CBS import report in LR2000. To use this method you must have read permissions to transaction processing. Near the bottom of the left-hand menu is a section titled transaction reports. Within that menu is an item title CBS import report. Click on that item to bring up a new screen. In LR2000, both successful and reject transactions are reported daily under their own tabs. Under the file name drop down menu for either the updated records or rejected records is a list of reports that is retained for about 90 days. Under each tab the reports are broken out into 3 categories: MC, MM and CR. The MC report is for mining claim transactions, the MM is for mineral material transactions such as stone or sand and gravel sales, and the CR report is for all other case types which have an interface with CBS. It is a good habit to

check this menu daily for any rejected records. It just takes a few minutes and errors are more easily resolved when they are caught right away.

Here is an example of a rejected transaction. This one is under the mineral material group and is for a transaction dated October 20, 2009. After selecting a report, click on the view rejected records button. To view the entire screen, click the link to display the entire report. We can see on the heading again that this is a mineral material report for a transaction that was rejected during the interface that was completed on October 20, 2009. The column headings that we will use are transaction type, and this could be an add or delete, a serial number, action date, code and remarks and this is the LR2000 action date and code and remarks that will populate the automated record. Under additional information is the transaction ID number. We will use this number to query CBS for a copy of the receipt. You can also use the receipt number; either one will work. At the bottom of the transaction listing is the error message. To the right of that is the office code and user ID of the staff member who will complete the transaction in CBS. We'll look at the error message. It states that it is an invalid case type. The case type associated with the serial number begins with 28; that tells me it is a right-of-way. The CBS transaction is for a mineral material sale as evidenced by the report heading; so, this would lead me to believe that there was a typographical error when entering the serial number into CBS. This should've triggered an error message in CBS; so it may have been overridden.

## Demo\_9\_Resolving\_CBS\_Interface\_Errors\_FINAL\_01

Now that we know the transaction or receipt number for the error, we can go to the CBS production screen retrieve the receipt. Access CBS by entering [cbs.blm.gov](http://cbs.blm.gov) in the internet address line; then click on the start CBS production button. Although we are in production mode; we are not required to enter a login or password. We simply click on the receipt button on the left menu.

(Dictation Ended)