

Nomination Account and Competitive Bid Procedures Checklist

Solar and Wind Nomination and Competitive Bid Fees

Inside Designated Leasing Areas (DLAs)

Checklist 1 – The Nomination Fee Phase – This checklist covers the essential and necessary financial tasks for nomination(s) inside a Designated Leasing Area (DLA). These necessary tasks start at the submission of a written nomination inside a DLA through establishment of a DLA 5101 account. If no written nomination(s) are received, but a Notice of Competitive Officer (NOCO) will be or has been recently published, please skip to Checklist 2 - The NOCO Phase below.

Mark or Date when Completed	Task Number	Description of Tasks	Project Manager/ Realty Staff	Budget	CBS	NOC
	1.0	Receive Written Nomination(s) with Fees	X			
	1.1	Serialize a casefile for the entire DLA in LR2000 (If not previously completed – do not serialize a casefile for each nomination)	X			
	2.0	Receipt Nomination Fee in CBS to Suspense Account <i>*see Nomination Fee – Suspense Account CSA below</i> (The DLA casefile number is needed for suspense entry in CBS)	X		X	
	3.0	DLA 5101 Document Assembling (This task only needs to be completed for the first nomination of each DLA for which a nomination is received – Skip to task 5 for all subsequent nominations)	X			
	3.1	Document 1: Complete 1310-20 Form	X			
	3.2	Document 2: Copy of CBS Receipt of Nomination Fee	X			
	3.3	Upload the two referenced documents to NOC SharePoint		X		
	3.4	Setup DLA L5101 WBS in FBMS				X
	3.5	Receive and distribute DLA L5101 WBS with Project Manager		X		
	4.0	Transfer Suspense Funds in CBS using established DLA L5101 WBS <i>**see DLA 5101 WBS CSA below</i> (The DLA WBS and DLA casefile number is needed to complete transfer in CBS)	X		X	
	4.1	Prepare a Reimbursable Project Log (1323-1) using the established DLA 5101 charge code and share it with Interdisciplinary Team/Mgmt.	X			
	5.0	If additional nominations and fees are received Deposit into Established DLA L5101 WBS <i>**see DLA 5101 WBS CSA below</i> (Depending on when nominations are received, this task may require working with the budget staff to update the Fund Year to the established DLA 5101 account)	X	X	X	

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Checklist 2 – The NOCO Fee Phase – The below list is designed to be used if a NOCO will be or has been recently published for a DLA. These necessary tasks start with the NOCO through the Lease Holder 5101 Cost Recovery Agreement (CRA) phase.

Mark or Date when Completed	Task Number	Description of Tasks	Project Manager/ Realty Staff	Budget	CBS	NOC
	6.0	<p>Competitive Bidding Day –</p> <ul style="list-style-type: none"> If bid payments are made by personal check, cashier's check, certified check, or money order – enter them into the CBS mailroom. If Bid payments are made by EFT/ACH or credit card, Receipt Bid Deposits in CBS to Suspense Account using serialized <u>DLA casefile</u> <i>***see Competitive Bid Suspense Account CSAs below</i> <p>(Bidding payment based on competitive bid method such as: sealed bidding, oral auctions, modified competitive bidding, electronic bidding, and any combination thereof.)</p>	X		X	
	7.0	<p>Unsuccessful Bidder(s) – Refund or Return Competitive Bids to Unsuccessful Bidder(s)</p> <p>(Monies in the mailroom will be processed as a return remittance and monies entered in suspense will have to go through a refund process)</p>	X		X	
	8.0	<p>Successful Bidder(s) – Serialize and enter each Successful Bidder in LR2000</p>	X		X	
	8.1	<p>Receipt each Successful Bidder in CBS to Bid Deposit Suspense Account <i>***see Competitive Bid Suspense Account CSAs below</i></p> <p>(The <u>successful bidder casefile number</u> is needed for suspense entry in CBS)</p> <ul style="list-style-type: none"> If fees have been applied to the mailroom (from task 6), do not forget to pull that payment out of the mailroom 	X		X	
	9.0	<p>Collect Remaining Successful Bidder Payments</p>	X			
	9.1	<p>Successful Bidder(s) Bonus Bid Balance – Within 15 calendar days the successful bidder(s) submits the balance of the bonus bid (after the variable offset are applied) (if applicable)</p> <p><i>****see Successful Bidder CSAs below</i></p>	X		X	

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	9.2	Successful Bidder(s) Acreage Rent – Within 15 calendar days the successful bidder(s) submits the acreage rent for the first full year <i>****see Successful Bidder CSAs below</i>	X		X	
	10.0	BLM offers ROW Lease to Successful Bidder(s) only if the Successful Bidder(s) make the payments required in tasks 6.0, 9.1 and 9.2 in addition to other requirements in 43 CFR 2809.15(d). Note: The BLM will not offer a lease to the successful bidder and will keep all money that has been submitted if the successful bidder does not satisfy the requirements of 43 CFR 2809.15(d).	X			
	10.1	Transfer Bid Deposit Suspend Funds in CBS Successful Bidder <i>****Successful Bidder (For each Successful Bidder)</i> These CSAs have 3 “actions” – Ensure fees are divided into the correct “action” types: Admin Fee, Bid Deposit, and, if applicable, the Bonus Bid (The Successful Bidder casefile number is needed to complete transfer in CBS)	X		X	
	11.0	BLM issues ROW Lease to the Successful Bidders(s)	X			
	12.0	Develop CRA for each ROW Lease Holder – Time spent developing the CRA is charged to the Administrative Fees received from the Successful Bidder(s) (L5102 COMP) in task 10.1	X			
	12.1	Negotiate CRA with Lease Holder(s)	X			
	12.2	Finalize CRA and deposit initial payment into CBS <i>*****see ROW Lease Holder – CRA Initial Payment CSA below</i> (The Successful Bidder casefile number is needed to complete entry in CBS) Finalizing CRA must be completed before moving to task 13	X			
	13.0	ROW Lease Holder 5101 Document Assembling This task needs to be completed for each ROW Lease authorized	X			
	13.1	Document 1: Complete 1310-20 Form	X			
	13.2	Document 2: Copy of CBS Receipt for Initial Cost Recovery Payment	X			
	13.3	Document 3: Copy of Finalized CRA	X			
	13.4	Upload the three referenced documents to NOC SharePoint		X		
	13.5	Setup ROW Lease L5101 WBS in FBMS				X

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Mark or Date when Completed	Task Number	Description of Tasks	Project Manager/ Realty Staff	Budget	CBS	NOC
	13.6	Receive and distribute ROW Lease L5101 WBS with Project Manager		X		
	13.7	Prepare a Reimbursable Project Log (1323-1) using the established ROW Lease 5101 charge code and share it with Interdisciplinary Team/Mgmt.	X			
	14.0	Transfer the Initial CRA Payment to ROW Lease 5101 WBS Transfer Funds from task 12.2 in CBS using the established Lease Holder 5101 WBS – This task needs to be completed for each Lease authorized <i>*****see ROW Lease Holder – CRA 5101 CSA below</i>	X		X	
	14.1	If additional 5101 payments are received Deposit into Established ROW Lease Holder L5101 WBS <i>*****see ROW Lease Holder – CRA 5101 CSA below</i> (Depending on when additional fund is received, this task may require working with the budget staff to update the Fund Year to the established 5101 Lease WBS account)	X	X	X	

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**COLLECTION AND BILLING SYSTEM (CBS)
COMMODITY, SUBJECT, AND ACTION CODES (CSAs)
CHECKLISTS 1 AND 2**

	Task 2.0	*Nomination Fee – Suspense Account
		DLA Casefile # needed for suspense entry in CBS
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Renewable Energy Management
✓	Subject	Competitive Lease/Grant
✓	Action	Initial Nomination Fee (XL6500DP) - Suspense Account

	Tasks 4.0 & 5.0	**DLA L5101 WBS
		DLA WBS # and Casefile # needed for entry in CBS
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Renewable Energy Management
✓	Subject	Competitive Lease/Grant
	Action	Nomination Fee (XL5017AP) (5101)

	Tasks 6.0 & 8.1	***Competitive Bid – Suspense Account
		Casefile # needed for suspense entry in CBS
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Renewable Energy Management
✓	Subject	Competitive Lease/Grant
	Action	Solar Energy Bid Deposit (*XL6500DP)
		Wind Energy Bid Deposit (*XL6500DP)

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	Tasks 9.1, 9.2 & 10.1	****Successful Bidder (For each Successful Bidder)
		Successful Bidder Casefile # needed for entry in CBS
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Renewable Energy Management
✓	Subject	Competitive Lease/Grant
	Action	Solar Comp Offer Admin Fee (L5102 COMP)
		Wind Comp Offer Admin Fee (L5102 COMP)
		Earned Solar Bid Deposit (*XL3220XM)
		Earned Wind Bid Deposit (*XL3220XM)
		Bonus Bid Payment (*XL3220XM)
		Initial Solar Energy Acre Rent (PD) (*XL3220XM)
		Initial Wind Energy Acre Rent (PD) (*XL3220XM)

	Task 12.2	*****ROW Lease Holder – CRA Initial Payment
		Successful Bidder Casefile # needed for entry in CBS
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Lands and Realty Management
✓	Subject	Rights of Way – Cost Recovery
	Action	Initial Payment Process Fee Cat 6 Act. Cost (*XL6500DP)

	Tasks 14.0 & 14.1	*****ROW Lease Holder – CRA 5101
		Successful Bidder Casefile # needed for entry in CBS
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Lands and Realty Management
✓	Subject	Rights of Way – Cost Recovery
	Action	Process Fee FLPMA CAT 6 Actual Cost (5101) W/PROJ