

5101 Application Filing Fee Checklist
Renewable Energy Application
Outside Designated Leasing Areas

This checklist covers the essential and necessary financial tasks for renewable energy applications outside a Designated Leasing Area (DLA). The below list of tasks is designed to be completed in numeric order.

Mark or Date when Completed	Task Number	Description of Tasks	Project Manager/ Realty Staff	Budget	CBS	NOC
	1.0	Serialize Application in LR2000	X			
	1.1	Receipt Application Filing Fee in CBS to Suspense Account *see Application Filing Fee CSAs below (The casefile number is needed for suspense entry in CBS)			X	
	2.0	L5101 Document Assembling	X			
	2.1	Document 1: Complete 1310-20 Form	X			
	2.2	Document 2: SF-299	X			
	2.3	Document 3: CBS Receipt of Application Filing Fee	X			
	2.4	Upload the three referenced documents to NOC SharePoint		X		
	2.5	Setup L5101 WBS in FBMS				X
	2.6	Receive and distribute L5101 WBS with Project Manager		X		
	3.0	Transfer Suspense Funds in CBS using established L5101 WBS **see Transfer CSAs below (The WBS and casefile number is needed to complete transfer in CBS)	X		X	
	3.1	Prepare a Reimbursable Project Log (1323-1) using the established L5101 charge code and share it with Interdisciplinary Team/Mgmt.	X			
	4.0	Establish a Cost Recovery Agreement? Document with a Cost Recovery Determination Decision <ul style="list-style-type: none"> • No – Determination made states Application Filing Fee is adequate – Done • No – Determination made was to rejected/withdrawn Application – Refund remaining funds • No – Determination made as a Category 1-4 – No CRA required, Skip Tasks 5-6.1 and 8.0-8.1 • Yes – Determination made as a Category 6 – Yes CRA required, Continue to Task 5 	X			
	5.0	Start Cost Recovery Agreement (only when Cost Recovery Determination Decision was determined to be a Category 6)	X			
	6.0	Finalize Cost Recovery Agreement	X			
	6.1	Upload signed Cost Recovery Agreement to NOC SharePoint		X		
	7.0	Check status of L5101 Balance with Budget (on-going)	X	X		
	8.0	If additional Cost Recovery funds are required – Create an Advance Bill in CBS (Depending on when additional funds are received, this task may require working with the budget staff to update the Fund Year to the established L5101 account)	X		X	
	8.1	Transfer Funds to appropriate L5101 WBS (reference Task 3.0)			X	

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COLLECTION AND BILLING SYSTEM (CBS) COMMODITY, SUBJECT, AND ACTION CODES (CSAs)

Task 1.1		*Application Filing Fee Casefile # needed for CBS entry
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Renewable Energy Management
✓	Subject	Application Filing Fee
	Action	Initial Solar Energy Dev (5101) (XL6500DP)
	Action	Initial Solar Energy Project Area Test (5101) (XL6500DP)
	Action	Initial Wind Energy Dev (5101) (XL6500DP)
	Action	Initial Wind Energy Project Area Test (5101) (XL6500DP)

Tasks 3.0/8.1		**Transfer in CBS to Established L5101 WBS WBS # and Casefile # needed for CBS entry
✓	CSA	Description (Select Appropriate Action)
✓	Commodity	Renewable Energy Management
✓	Subject	Application Filing Fee
	Action	Solar Energy Dev (XL5017AP) (5101)
	Action	Solar Energy Project Area Test (XL5017AP) (5101)
	Action	Wind Energy Dev (XL5017AP) (5101)
	Action	Wind Energy Project Area Test (XL5017AP) (5101)