

## Instructions to Create the Inspection and Enforcement Strategy Matrix for Fiscal Year 2007

### Excel Spreadsheet

**NOTE: This spreadsheet is to be used until AFMSS is available. The matrix MUST be entered into AFMSS immediately after all backlogs are entered into the system and the Priority Rollover function can be performed. Do not attempt to perform the rollover or enter the matrices until all backlog inspections and other data is entered.**

Due to AFMSS being shut down, separate I&E Strategy Matrices for FOs with Indian data must be created “manually.” Excel spreadsheets have been developed to provide a consistent format for the matrices until AFMSS can be used. It will no longer be possible to produce a “combined” matrix for Federal and Indian data. Therefore, separate matrices should be created – one for Federal data and one for Indian data. A combined matrix can then be created using the Excel spreadsheet. Spreadsheets for all versions are being provided for your use.

Under normal circumstances, the matrix is created in AFMSS, and several automated processes occur. In AFMSS, the Inspections Items report (IEP.51) provided useful information in determining the cases that needed to be inspected for the coming year. Because this is not available, it will be necessary to use any data that you have available, such as old reports, to determine how many cases fall into each overall priority rating.

Steps for completing the Excel spreadsheet:

1. Field Office: Click into cell C2 (shown below in light green) and enter the FO Name.
2. Version: Enter a “Version” name. Click or tab so the cursor is blinking in cell H2. In the top bar, circled below, the word “Version:” appears. Click so the cursor is blinking directly behind the word and type in the name you want for this version of the matrix.

As you type, the name will appear in cell H2. Press the enter key or click to exit the cell.

3. Official/Working Copy: In the cell directly below “Version” (cell I3), enter whether this version is the “Official” or “Working” copy. A “Working” copy of the matrix may be used until you are confident that it is complete. Change the cell from “Working” to “Official” to indicate that the matrix is to be used for the FY. In cell I4, enter the date the version is created.
4. Production Inspection Items: Enter data into the lighter (cyan) shaded fields only. All other fields contain calculations and care should be given not to add data to the cells that are white in color. If you do, the formulas will be lost and must be re-entered. (The exceptions are the Remarks and Special Considerations sections.) Complete section “2. Production Inspection Items” to the best of your ability. Enter the number of Federal and Indian Producing and Non-Producing cases for each category. The total will automatically be input into the correct fields.

Note: You may have to use the numbers from your last matrix to complete this section. If possible, include any cases that your office has received since the shut down occurred (April 8, 2005). Do not include any cases that are inactive or abandoned.

5. Drilling, Plugging, and Workover Inspection Items: Enter the number of estimated Federal and Indian High and Low Priority Drilling, Plugging, and Workover Inspections to be conducted during the FY in the appropriate fields as shown below.
6. Environmental Inspections Items: Enter the number of Federal and Indian High and Low Priority Environmental Drilling Inspections. These numbers should total the same number of Drilling Inspections estimated for the year.

Enter the number of Federal and Indian High and Low Environmental Producing Items in the appropriate cells. These two columns should equal the Total Items (producing and nonproducing) that were calculated under section “2. Production Inspection Items” (cells B12 and C12).

Enter the number of Federal and Indian High and Low Priority Environmental Abandonment/Reclamation Inspections to be conducted during the year.

**Note:** It is always a good idea to intermittently SAVE your work! Please save your file in this format: (Field Office name) \_strategy\_matrix\_FY07.xls

7. Positions and Work-months Dedicated to the Inspection and Enforcement Program: Enter the positions and work-months information for your office into the appropriate fields.

Enter the number of personnel that work in, or are associated with, the I&E program. For example, you may have personnel in your FO who provide support or assistance to the I&E Program, but are in other areas of the FO, such as Operations, Wildlife, Resources, and so on. Prorate the number of work-months for any Natural Resource Specialists/Environmental Specialists that support I&E but may work in other offices or divisions.

To ensure proper accounting of the work-months needed for the program, use a base time of 12 work-months for each FTE. Enter the number of work-months that are expected to be devoted to completing inspections in the “I&E Insp Wkmths” column(s). At least 2 of the 12 work-months should be input into the “Misc. Wmths” column(s) to account for annual and sick leave, meetings, and so on. Account for the overtime work-months in the “Overtime Wkmths” column(s). Time worked outside of the I&E Program, such as range or fire, should not be accounted for in the Inspection Plan Matrix. Oversight time should be accounted for under Management support. Specific details regarding oversight work-months planned may be documented under the “Special Considerations” section of the matrix.

The following section “6. Inspections Required and Planned” will be automatically populated. No data entry is required or allowed in this section.

8. Number of Inspections and Work-months: Page 2 of the matrix deals with inspection types, average inspections hours, etc.

Enter the average inspection hours for each of the inspection types (Federal and Indian). Until AFMSS becomes available, you may have to use the average inspection hours recorded on your FY2006 matrix.

Enter the number of Federal and Indian inspections required and planned for each of the inspection types.

The “Work-months” section on page 2 and the “Inspections Required and Planned” section on page 1 will automatically populate based on entries in other sections of the spreadsheet.

9. Remarks and Special Considerations: The cells related to the Remarks and Special Considerations sections have not been formatted.

Enter pertinent information into the Remarks section. Document position and work-month availability descriptions, and any additional idle/orphan well workload adjustments made to the strategy, and the number of production record reviews (PRs) your office plans to conduct during the FY.

Enter any Special Considerations as needed.

10. Printing the Spreadsheet: The “Print Area” has been set to include pages 1 and 2. It may be necessary to adjust the print area if your Remarks or Special Considerations sections exceed the length of page 2. To reset the print area, click on File, Print Area, and Clear Print Area.