AFMSS Bond Adequacy Review Instructions

Bond Adequacy Review (GLB.68)
AFMSS
Version 3.7.18
(July 2012)

The Automated Fluid Minerals Support System (AFMSS) Version 3.2, released on April 28, 2003, contained new screens for the tracking of Bond Reviews and includes the ability to maintain a history for changes that occur on a particular bond.
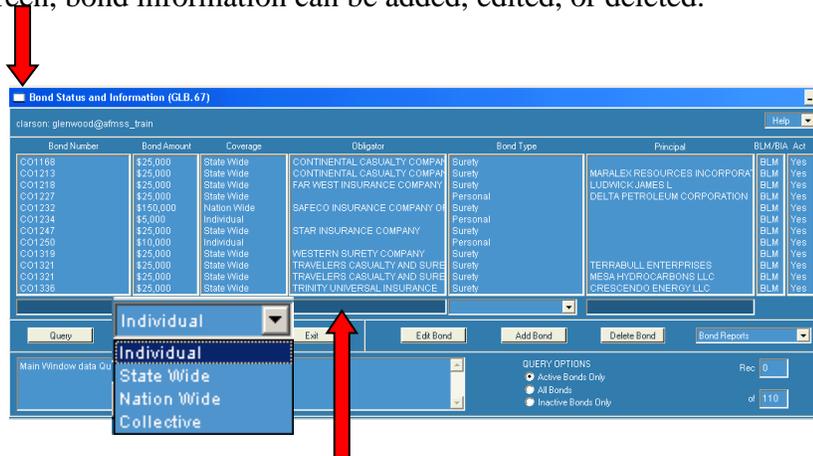
This document outlines the screens and steps that should be followed to enter data related to Bond Reviews and changes to bonds:

From the AFMSS Main Menu, click on **Adjudication**, and then click on Bonds.


The **Bond Status and Information (GLB.67)** screen is launched.

From this screen, bond information can be added, edited, or deleted.

To find an existing bond, enter data into one or more of the **Query By Example** (QBE) fields (darker shaded fields), and click 'Query.'

The small down arrows (Twisty) under the columns for Coverage and Bond Type can also be used to query for data. Click on the Twisty/down arrow button to bring a list of valid entries for those columns. Choose the entry by clicking on the desired selection.
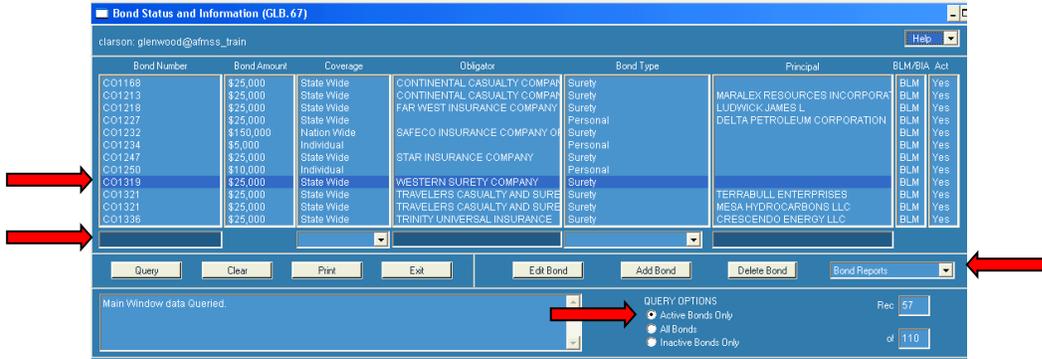
To retrieve all bonds in the database, leave the QBE fields blank and click 'Query.' Depending on the number of bonds that have been entered, this could take a long time. The default radio button is for Active Bonds Only. However, you may toggle to All Bonds or Inactive Bonds Only before clicking on Query.

Two different types of bond reports are also available from this screen – the standard 'Bond Report' and '**Bonds Reviewed Report**.' This option is available with a Twisty button along the same line of the QBE fields; they will be discussed later in this attachment.

Highlight the bond to be reviewed or updated, click on 'Edit Bond.'

Maintain Bonds (GLB.68) is launched.
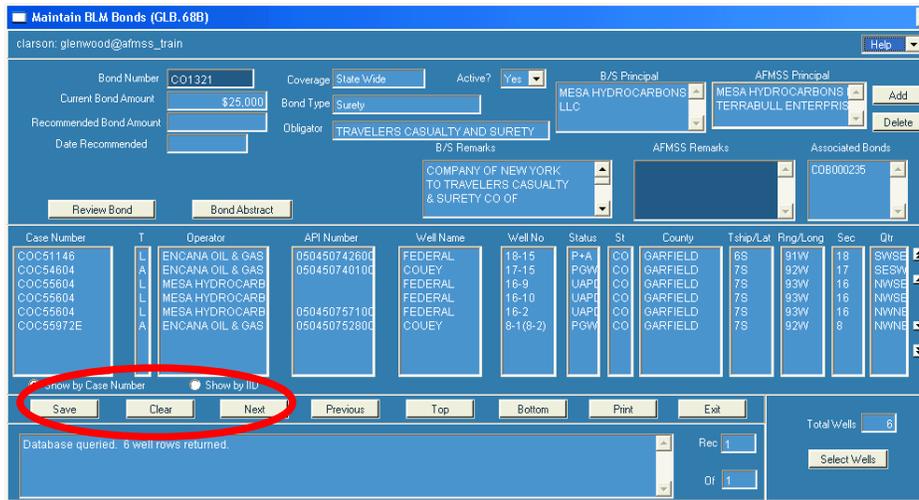
This screen contains information about the bond along with the well (completions) attached to the bond.

It also includes the ability to track the current bond amount, increases or decreases to that amount, and bond adequacy reviews performed.

An interface with the Bond and Surety System allows you to view the Bond Abstract from this screen by clicking on the **Bond Abstract** button.

There is a selection for **Review Bond** which also displays the history of bond changes.

Additional fields: Current Bond Amount (which is from Bond and Surety and is the actual bond amount; Recommended Bond Amount; and Date Recommended (which is the date a bond increase/decrease is recommended to the State Office).

The Bond Review History Screen consists of four parts. The top portion displays the **Bond Number** and **Current Bond Amount**. (The Current Bond Amount will come from the Bond and Surety System and will not change until that system is updated.)

The next section is to enter the **Bond Adequacy Review Date**; Acceptable (Yes/No); and the name of the person who performed the review.

If a change to the **Bond Amount** is required, the fields **Change Bond Amount** section are filled with data. The **Recommended New Bond Amount** field is to capture the amount that will be recommended to the State Office. Enter the dollar amount in whole dollars, the new bond amount (i.e., 50000 – press the TAB key. The amount will change to $50,000).

The **Date Recommended** must be entered to record the date the bond amount change was given to the State Office. Finally, select the **Reason for Bond Increase** from the drop down list. If the bond is decreased, a reason is not mandatory. When all data has been entered, click on the Save button.

The **Bond History** will be displayed in the fourth section of the screen.

You can see a row has been added for the **Bond Review**. Click 'Exit' to return to the **Maintain Bonds screen**. This returns you to the Maintain Bonds (GLB.68) screen.

The '**Current Bond Amount'** is not updated until it is done so in the Bond and Surety System.

The "**Recommended Bond Amount**" and "**Date Recommended**" fields are displaying the data from the Bond Review screen.

Two bond reports are available; the Bond Report (GLB.101) and Bonds Reviewed Report (GLB.102).

The reports can be accessed two ways. From the Main Menu, click on 'Adjudication,' and then click on 'Bonds.' In the Bond Status and Information (GLB.67) screen, click on the small down arrow next to Reports (in the lower right corner of the screen).
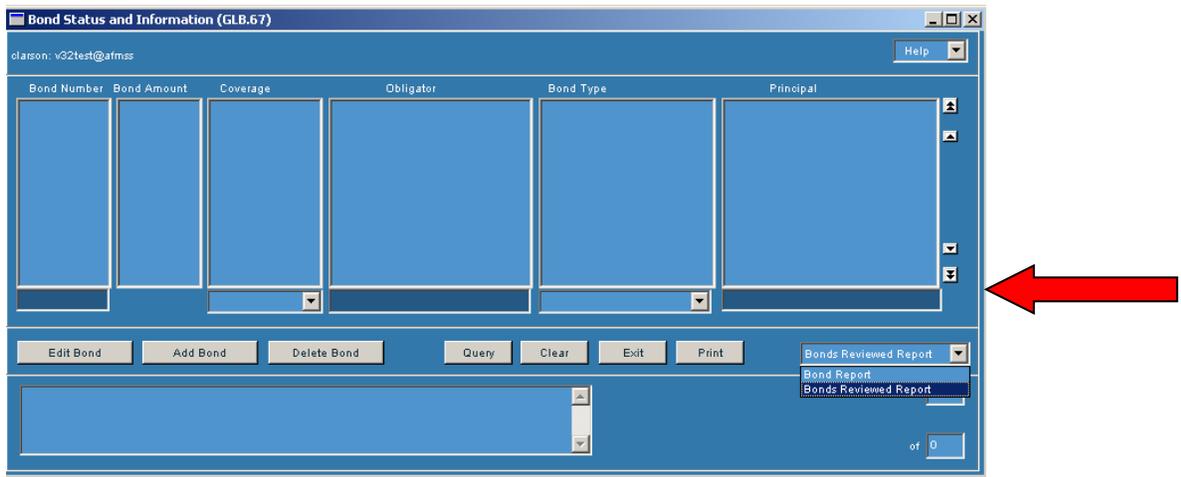
Another way to find these reports is from the Main Menu, click on **Reports**, and then click on 'Bond Reports.'
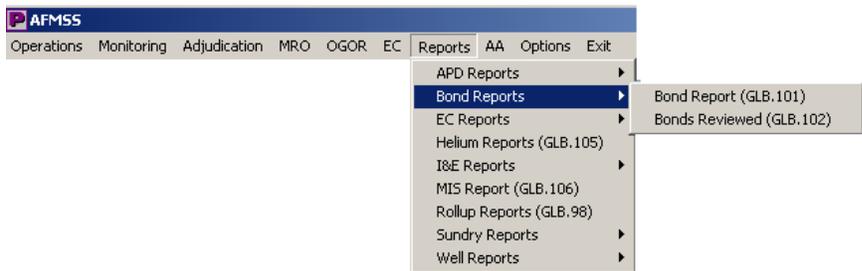
The **Bond Report (GLB.101)** will provide all information for each bond. If you want information for every bond, leave the criteria fields blank. However if you want to limit the results of the report there are several options available.

To look for a particular bond, enter the bond number into the "Bond Like" field. To find a range of numbers, or if you are not sure of the exact bond number, a wildcard character can be used. For example, to find all bonds beginning with **CO**, type CO% into the Bond Like field. The wildcard or multiple wildcards may be used in a field. (CO%99% will find all bond beginning with CO and containing 99 at any position within the number.)

Wildcards may also be used in the **Cases Like, Operators Like**, and **Principals Like** fields. Sort options are also available.

The default is to sort the report by Bond Number. The report can be sorted by **Case** or by **Operator**.

The Grey Bar Overlay prints a light grey section every third row to make the report easier to read.

Click **Print**.

To view the **Report Write Up** which describes the parameters that were used to develop this report, click on the "Rpt Write Up" button.

GLB.101: Bond Report by Bond

CASE NUMBER	API	WELL NAME	WELLNUM	OPERATOR	STAT	FIELD	TWP	RGE	SEC	QTR
Bond: CO0039	B&S Amount: $150,000 Rec. Amount:			Rev Date: 04/10/2003 Rec. Date:	Coverage: Nation Wide Type: Surety Bond Level Acceptable?: Y		Obligator: ST PAUL FIRE AND MARINE Principal(s): KOCH EXPLORATION CO LLC			
2277707X	050459067800X1	MY WELL	#1	MY OIL AND GAS COMPANY	P+A	RULISON	6S	94W	18	SESE
8015394039X	050459086200S1	HAMMOND	1-1	SUNWALKER	P+A	ASBURY CREEK	4S	10E	7	NESW
COC7466600X	050459027800S1	WIKI	1	WIKI OIL BENSON	P+A	RULISON	6S	94W	18	SESE
Bond: CO0265	B&S Amount: $25,000 Rec. Amount:			Rev Date: Rec. Date:	Coverage: State Wide Type: Surety Bond Level Acceptable?:		Obligator: WESTERN SURETY COMPANY Principal(s): GORDON ENGINEERING INC			
COC2277718X	050459040700S1	CAROL WELL	23	LARMAN OIL COMPANY	P+A	GASAWAY	5N	57E	12	NWNW
COC3284238X	050459025700S1	RUDI	15	JOHNSON COMPANY	POW	CACTUS VALLEY	6DS	94W	17	SESE
Bond: CO0456	B&S Amount: $10,000 Rec. Amount:			Rev Date: Rec. Date:	Coverage: Individual Type: Surety Bond Level Acceptable?:		Obligator: TRAVELERS INDEMNITY COMPANY Principal(s): BACON LEROY ESTATE STELBAR OIL CORP INC GUTRU ROBERT J TRUST			
COC6363600X	050459035800S1	DAVID	64	PUNKIN	PGW	BEAR GULCH	5N	57E	12	NWNW

The **Bond Reviewed (GLB.102)** report retrieves the bond information for reviews that were conducted during a particular time period.

Enter the starting date for the report. The date can be entered as month – (space) day – year, i.e., 4 1 03. Press the **TAB key** and the date is filled in as 04/01/2003.

Enter the ending date for the report in the same date format.

Sort options are available. The default will sort by Bond Number. Select another option by clicking in the small circle next to the option.

There is also an option to print any remarks associated with the bond. To print the remarks, click in the box next to 'Print Remarks?'

The Grey Bar Overlay is also available.

Bonds Reviewed Report (GLB.102)

clarson: glenwood@afmss_train   Help ▾

Start Date 01/01/2010
End Date   05/01/2010

Sort By ● Bond Number
         ○ Last Review Date
         ○ Bond Level Accept
         ○ Bond Amount
         ○ Coverage
         ○ Type

☑ Print remarks?
☐ Grey Bar Overlay?

[Exit] [Print] [Rpt Write Up]

Click on **Print**.

GLB.102: Bonds Reviewed for COLORADO RIVER VALLEY F.O., from 01/01/2003 to 05/01/2010

Sort by: Bond Number

BOND NUMBER	LAST REVIEW DATE	BOND LEVEL ACCEPT	B&S BOND AMOUNT	REC BOND AMOUNT	DATE REC	COVERAGE DESCR	TYPE DESCR	OBLIGOR NAME	PRINCIPALS
ES0183	04/10/2003	Y	$150,000			Nation Wide	Surety	RLI INDEMNITY CO	TOM BROWN INCORPORATED
	Remarks:								
MT0735	04/10/2003	Y	$150,000			Nation Wide	Surety	TRAVELERS CASUALTY AND SURETY	HEC PETROLEUM INCORPORATED
	Remarks:								
NM2545	04/10/2003	Y	$150,000			Nation Wide	Surety	UNITED STATES FIRE INSURANCE	WILLIAMS PRODUCTION RMT CO
	Remarks:	All liability moved to NMB000396.							

Bond Level Accept (YES):   28
Bond Level Accept (NO):   1
Bonds Unreviewed: 0

Total   29