



Bond Tracking System

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Bond Tracking System
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Instructions

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Processing a Bond:

The menu on the left-hand side represents the options available for processing a Bond.

The following are explanations of each of the menu options:

Instructions:

will display this screen.

Unprocessed B-Permits Bonds

will display all B-permit Bonds that need processing by the Bureau. Any Bonds that were previously processed will not be displayed. Processed Bonds can be viewed by using the *Search for a Bond* option.

Search for a Bond:

will display any Bonds whether it was processed or not.

Administration:

This option is for the Application Administrator and it requires that the option be activated.

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I **UNPROCESSED BONDS**

Check if there are bonds listed above Bond Ref #10029 (this is currently the reference point).

If there are, follow these steps:

- CLICK the bond ref no.
- Check the BOND STATUS.
If the bond was just prepared for the customer,
BOND STATUS should show as **WAITING FOR CUSTOMER**.
- Check if the ATTACHMENTS have been uploaded.
If not, notify the bond preparer to upload the attachments.

Repeat the process for each bond shown above Bond Ref #10029.

NO STATUS ASSIGNED indicates that the executed bond has been

- Uploaded
- **Forward to CAO for Approval** box has been checked.

Click **UPDATE BOND INFORMATION**.

BONDS REQUIRING ACTION

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Expiring in 60 Days Expired Bonds Exp. Bonds-No Response Bonds to Default Reviewed by CAO Docs Requested

12 Bonds Will Expire in 60 Days

Bond Ref. #	Imp. Bond #	Project Type	Principal	Amount	Exp. Date	Warning Ltr Sent	Action
9133	CAO060034S	Tract	RAQUEL OHNONA		12/18/2016	Yes on: 10/19/2016	Print
13440	CAO130222S	Tract	FIFTEEN ROWENA, LLC	\$77,000.00	12/18/2016	No	Print
14134	CAO140321S	Tract	TULAROSA 8, LLC	\$198,000.00	12/18/2016	No	Print
14156	CAO150017S	General Improvement	BELLICO, LLC	\$56,000.00	12/17/2016	No	Print
12805	CAO130014S	Tract	GEORGE P. KOLOVOS AND TINA KOLOVOS, TRUSTEES OF THE KOLOVOS TRUST DATED JULY 2, 1986; 1825, CORINTH LLC; OPEN CITY, LLC	\$16,000.00	12/15/2016	No	Print
14150	CAO150245S	General Improvement	DAVID RICKER DBA AMERICANA TRUST DEED SERVICES	\$32,000.00	12/14/2016	No	Print
14155	CAO140335S	General Improvement	HAWTHORN AT POINSETTIA LLC	\$78,000.00	12/14/2016	No	Print
14329	CAO150241S	Import/Export	JASON P. RUBIN	\$788,000.00	12/12/2016	No	Print
14140	CAO140334S	Street Improvement	VISTA SUPERBA PC, LLC	\$18,000.00	12/07/2016	No	Print
13009	CAO120249S	Lateral Support	JORGE CARMONA	\$52,000.00	12/06/2016	No	Print
14135	CAO140336S	General Improvement	SHAHROKH MAKHANI	\$39,000.00	12/06/2016	No	Print
8944	CAO213336	Tract	MOHAMMAD HAIDARIAN AND FARZAD SHABESTARI		10/23/2016	Yes on: 08/25/2016	Print



EXPIRING IN 60 DAYS

PRINT the list.

SELECT (highlight) the **B-PERMIT BONDS ONLY**.

For each B-Permit bond record,

- Click **PERMIT CLOSURE CARD**
- If there is a **BCA Final Inspection Date**,
Check the **Warning Letter not Required box**.
Click **UPDATE BOND INFORMATION**.
- If there is **NO** BCA Final Inspection Date,
Put a check mark on the list.
Prepare document – **PROJECT EXPIRATION WARNING NOTICE**

Provide the list for CK to prepare the warning letters.

Review the letters prepared by CK.

Check if the following are correct:

- CAO #
- Address
- Title
- Permit No.
- Surety Bond No.
- Engineering District
- Surety Company/ Address
- Bond Ref No.

② EXPIRED BONDS

PRINT the list.

Click EACH bond ref no.

For each **B-PERMIT** bond record,

- Verify if the **BOND DEFAULT DATE** is correct. If the date is not correct, enter the correct date. Click **UPDATE BOND INFORMATION**.
For Subdivision bonds, check if the map has recorded.
DEFAULT date for subdivision bonds is 2 years after map recordation.
- Click **PERMIT CLOSURE CARD**
- If there is a **BCA Final Inspection Date**,
Check the **Default Notice not Required** box.
Click **UPDATE BOND INFORMATION**.
- If there is **NO** BCA Final Inspection Date,
Put a check mark on the list.
Prepare document – **PROJECT EXPIRATION NOTICE**

For each **E-PERMIT** bond record,

- Open the E-Permit application
- Search for the E-Permit
- Click **FINAL INSPECTION** record
- If there is a FINAL INSPECTION date,
Go back to the bond record.
Check the **Default Notice not Required** box.
Click **UPDATE BOND INFORMATION**.
- If there is a **NO** FINAL INSPECTION date,
Put a check mark on the list.
Prepare document – **PROJECT EXPIRATION NOTICE**

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DOCS REQUESTED

The documents requested here by LDG are all **SUBDIVISION** bonds.

PRINT the list.

Go to the **DATE REQUESTED** column.

Check for the most recent date.

Click the Bond Ref No.

Click **VIEW DOCUMENTS**.

View the approved bond document.

- If the approved bond document has the signature of JC, there is no need to send bond document to LDG.
- For other signatures shown on the approved bond document,
LOCATE the hard copy of the bond.
Prepare and print the **UPS shipment form** (see separate instructions).

Go back to **Review Bond**.

Scroll down to **Request Original Bond Documents**.

Go to **Date Documents Sent**.

ENTER date.

Go to the UPS Store on Van Nuys Bl. and give the bond document with the shipment form for mailing. (Be safe when crossing the danger zone)

SS 6/23/2015



E-PERMIT MCBs

Select E-PERMIT MCBs in the main menu.

Click the Bond Ref No. on the list.

Select **VIEW ATTACHMENTS**.

If there are attachments, **UPDATE** the bond record and enter the following info:

- Project Type
- Permit No. (if available)
- Project Scope
- Actual Bond Amount (spelled out)
- In the BOND STATUS, select **ACTIVE**.
- In the BOND SECTION COMMENTS, type “**Updated bond record**”.

Click **UPDATE BOND INFORMATION**.

If there are no attachments, the bond records are updated when the MCB and application are received by gray mail.

(The gray mail envelopes are found in Susan’s IN-BOX on the 3rd flr or 2nd flr.)

Write the Bond Reference No. on the pink copy of the MCB.

In the bond record **VIEW ATTACHMENTS**, **UPLOAD** the MCB, the application, estimate and other related information.

If CK is available, give the documents for uploading.



PERMITS TO BE CLOSED

WORK ORDERS TO BE CLOSED ARE FOR **B-PERMITS ONLY**.

Check this task first thing in the morning and at the end of day.

On the main menu, select **PERMITS TO BE CLOSED**. Print the list.

See the last column - **BOND TO W.O. UNIT CLOSE**

In order to fill out the date for this last column, follow these steps:

- Go to **Search for a Bond**
- Search bond by **B-Permit number**.
- Verify if the bond is a SURETY BOND or an MCB.
- Make a note on the list for each B-Permit.

Go back to the main menu.

Select **PERMITS TO BE CLOSED**.

For B-Permits with **SURETY BONDS**:

- Click the **Permit Ref. No.** (1st column)
- Go to **Permit Closure**
- Go to **Bond Control Approval**
- Click link "**Sign off W.O. Closing Notice**"
- **Work Order Closing Notice** appears
- Enter your signature (password) - ssugay
(Please obtain your password from Essam if you do not have one)



BONDS TO RELEASE

BONDS TO BE RELEASED ARE FOR **B-PERMITS ONLY**.

On the main menu, select **Bonds to Release**. Print the list.

(This list still includes permits that have been completed, bonds not necessarily released).

See the last column – **FINAL ACCOUNTING COMPLETED**.

Select the most **current dates** on the list. Highlight the bond ref #.

Go back to the main menu.

Go to **Search for a Bond**

Search bond by **Bond Ref #**.

Check for bond type as in:

- **SUBDIVISION** or **NON-SUBDIVISION**
- **SURETY** or **MCB**

Indicate the types of bond on the list. Doing this would make it easier to choose the correct template for exoneration.

PREPARE THE EXONERATION LETTER USING THE CORRESPONDING TEMPLATES FOUND IN THE SECURE DRIVE/ BOND CONTROL FOLDER.