4L2.3 – Project Coordination Services:

Project Coordinator:

The Consultant will be responsible for coordinating and tracking all acquisition and relocation coordination activities for the project working closely with the Lead Agent. The Department Project Manager (PM) and Right of Way Project Lead (ROW Lead) will delegate work assignments, monitor quality of work and will provide input on performance. The Consultant will provide consultation, make recommendations, give appropriate advice, and perform the necessary services.

Task 1 Pre-Acquisition:

- **Attend meetings as requested by the Lead Agent.**
- **Discuss preliminary scope of work for each task or activity with the Lead Agent.**
- **Set-up work plan and template in ePM.**
- **Request contact list from engineering consultant or Environmental of names, phone, email, etc. of all attendees from public meetings. Add this information to parcels as they come in to ePM.**
- **Set-up Project plan, schedule & tasks in the 760 screen** - **Maximum time for project set-up tasks should be no more than 7 days total from the date a summary is received.**
- **Project Coordinator will update ePM data & dates until cleared.**
- **Project uploads.**

  a) Assist with e-summary uploads as needed.

  b) Troubleshoot as needed.

- **Create labels & file folders** – (This process may change as UDOT moves forward to a paperless environment.)

  a) To be completed for a typical 10 ownership summary within 2 days after the summary has been approved.

  b) ePM for labels: Reports, Acquisition, project file folders.

  c) Pick color of folders to be consistent throughout the process.

  i:) Folder contains: ROW Maps, Ownership Records, Signature Deeds, Vesting Deeds/documents, deed plotter (All Required) Print these from ProjectWise for the file.

- **Distribution of summaries.**

  a) Electronic copy is to be forwarded to the appraiser to order the appraisal (as directed by the ROW Lead).

b) Verify the electronic download is stored in ProjectWise. (entered by the engineering company hired for the project.)

- **Send initial contact letters to owners.**

  a) Based on the direction from the ROW Lead, determine whose name will be on the letter (lead or Project Coordinator) then set-up ePM accordingly (See screen 760 task .05.)

  b) Determine type of letter needed (depending on valuation type ACE or Appraisal and whether or not there will be a home inspection etc.)

  c) Send letter to owner so that it is received before the appraiser meets with owners.

- **Review tasks that are assigned in the 760 screen.**

  a) ROW Lead will inform Project Coordinator who the appraiser, reviewer, acquisition agent and relocation agent. If the above personnel are not on the template, enter them into the 760 screen for the parcels they will be working on.

  b) If there are tasks that are not needed in the default plan delete unassigned and unneeded tasks such as appraisal and review (if there is an ACE not an appraisal) etc.

  c) ROW Lead will coordinate with Consultant Services to prepare consultant contracts. Project Coordinator is cc'd on emails.

  d) Enter consultant data in ePM (if new, make sure they are listed as "employees" in ePM.)

Task 2 Acquisition Files From Consultants Requesting ROW Approval:

- **Acquisition Files from Acquisition Agents.**

  a) Check packet against checklist.

  b) Make sure phone number of Grantor is on the ownership tab and on the checklist.

  c) Check ePM to verify the land value and other data has been entered correctly and completely. Make sure the ownership tab reflects the amount of the contract.

d) Check ePM to verify the value and other data has been entered correctly and completely. Make sure any hand written information on the contracts or settlement invoice have been entered into the parcel “Note Type” screens.

e) Look for all required documents and verify that they are in the file. If documents are missing notify the ROW Lead and Consultant Agent. Hold file until documents have been received. Move file forward upon receipt of documents.

f) Once all these are checked, submit to ROW Lead for review, approvals, and signatures (This process is subject to change as UDOT moves to a paperless environment.)

g) After the ROW Lead approves the contract, he will return the file to the Project Coordinator.

h) Delete unnecessary tasks/fields on the 760 screen.

i) Check the 760 screen for completion dates and rate the agent if the leads did not rate them, based on the timelines of the completion. Rate the performance in ePM based on rating criteria. If there are questions please see the ROW Lead for input.

j) Enter on the 760 screen the date that the file has been moved for ROW Contract approval. Enter date on Google tracking sheet as well.

k) Project Coordinator then forwards the file with the contract and all other necessary documents to the Director of Right of Way (or Deputy) for review and approval signatures.

l) The Director/Deputy will sign or reject the file and return the file to the Project Coordinator who will then put fully executed documents into ProjectWise and move the file forward to closing.

- **Files from Appraisers and Reviewers.**

  a) Project Coordinator will verify all appraisal data has been correctly input into ePM. (The approved value is typically input by the Lead Agent or Acquisition Agent, in some cases the Lead Agent may ask the Project Coordinator to do this.)

- **Relocation Files and Payments.**

  a) When Claims are submitted for payment, match the claim with the original relocation file.

  b) Verify that the claim amount(s) match the relocation study, bids and/or HUD.

  c) Verify that the relocation information is entered into ePM (check all relocation screens.)

d) Verify “Make a Payment” data and verify that the relocation potential payment amounts have been entered on the eligibility tab. If payment is going to a vendor, make sure that we have an invoice and vendor is set up in Finet. If vendor is not in our system verify that a W-9 form has been obtained.

e) Submit claim for final approval.

f) Upon approval, scan claim with supporting documents and name using the proper ProjectWise naming convention. Store and attribute in ProjectWise.

g) Request payment from Finet. Enter check request date in make a payment screen. (Parcel tab>acq>600 relo>payment>make a payment.)

h) Upon receipt of check scan and put into ProjectWise. Enter check number in the make a payment screen. Mail or notify agent that the relocation funds are available to pick up and deliver to the claimant.

i) Verify if relocation agent has entered the date of displacement and the final claim as applicable on the date tab in the relocation screens.

- **Condemnation Files from Consultants.**

a) Check file against Condemnation Check list and make sure that full condemnation package is uploaded into ProjectWise.

b) Make sure the 4 options letter is in the file and the date has been noted in the agent log. (See the type column _ ACQ -4 options letter.)

c) Verify that two copies of the condemnation file have been received. (This process may change as UDOT moves forward to a paperless environment.)

d) In the 760 screen add all tasks for condemnation. Delete the previous tasks and create new tasks (see all Condemnation tasks.)

e) Move file forward to the ROW Lead Agent for review, and then move to the closing agent to begin condemnation process.

Task 3 Acquisition Closing Process:

- **When files are returned from Director or Deputy Director.**

a) If the file has been rejected by director/deputy take the necessary steps to fix the problem. Notify the lead and agent why the file did not pass for final signatures. If the file has been signed proceed.

b) When the file is returned to the Project Coordinator, review the data in ePM to ensure that the Cleared Date and/or Acquisition Clear Date have been entered by the Director/Deputy.

c) Scan the documents that have their own naming convention for ProjectWise. Name them accordingly and drop into ProjectWise.

d) Attribute the documents that you have scanned in ProjectWise. Stamp original document with scanned stamp.

e) Review the order of the file and forward it to the Closer for closing.

f) Enter on the 760 screen the date the file was signed by the director/deputy and the date the file was sent to the closer. Enter closer name in 760 screen.

g) Submit file to closers. Enter date sent to closer on tracking sheet.

h) Closer will return file to Project Coordinator for final Quality Control check of the file: check, settlement statement, letter, HUD, title insurance to all be input into ProjectWise.

- **Post Certification Process/Close-out.**

a) The ROW Director (or Deputy) will have entered the Cleared Date and/or Acquisition Cleared Date when they approved the acquisition or relocation file. If date was not entered, the Project Coordinator can notify the Deputy Director for clarification.

<u>Task 4 Quality Control:</u>

a) Ensure all documents are correct.

b) Verify that all data has been entered into ePM.

c) Validate that all files are uploaded into ProjectWise and content is both accurate and complete.

d) Send reminder emails or notices when appraisals or reviews are due as needed.

e) Provide feedback to the ROW Leads regarding delays, failure to meet deadlines, incorrect data entry and/or incomplete files.

Task 5 Certification of Right of Way:

- **Coordinate with the ROW Lead on what efforts are needed to be completed by the Project Coordinator.**

  a) Certification with Limitations.

    i:) Make sure all parcels listed on certification are in ePM.

    ii:)Each parcel has an Project Clear Date shown on the Status Screen.

  b) Without Limitations.

    i:) Make sure the total number of parcels listed on certification is the same as in ePM on the status tab (note: parent/child relationship should only count as one ownership.)

    ii:) Make sure all parcels are cleared by contract, ROO, or condemnation.

Task 6 Closing out a project in ePM:

- **Verify that the total on the ownership screen is the sum of all contracts pertaining to the ownership. (ie Contract + Cost to Cure Contract = Total.)**
- **From the status tab, print all lists that showing remaining parcels greater than zero.**
- **Work with the lead agent on completing those lists until the remaining is zero.**

  a) Make sure all ownerships are cleared or in condemnation.

  b) Make sure all parcels are cleared.

    i:) If they need to be voided provide proof.

  c) Make sure all ROO's are cleared (ROW Contract or turned into condemnation.)

  d) Make sure all ROO's are recorded and recording information is entered on the parcels tab.

  e) Make sure all parcels are recorded and recording information is entered on the deed tab.

- **Run the relocations report {Reports>Management>Relocation Ownerships} and verify that the date of displacement has been entered on the date tab, for each relocation. The date tab is in the relocation screens.**
- **On relocation Claims recap spreadsheet, Make sure on the final claim that the eligibility and the claimed amounts zero out.**

Task 7 Final Coordinator QC of ProjectWise:

- **Create a spreadsheet to verify.**

  a) All documents with a specific naming convention are in ProjectWise.

  b) All documents name and attributed correctly in ProjectWise.

  c) Verify all relocation claims and studies are in ProjectWise and named and attributed correctly.

  d) Conduct an audit with UDOT Project Coordinator to verify information.

Task 8 Outside Agent Setup and access to ePM:

- **From our website under doing business / consultant or designer resources.**
- **Outside agents must complete website information online. ePM Support will then complete the set up process for their access into ePM.**
- **On individual screen, check ePM user name to verify ePM Support has entered consultant name correctly.**
- **Enter the agent in our ePM employee data base.**
- **Assign security.**

Task 9 ePM Training & Updates:

- **Work with ISS and DTS regarding updates to the system.**
- **Provide team support.**
- **Work with consultants as needed to train on acquisition and relocation screens.**

Task 10 Consultant Payments:

- **Coordinate with ROW Lead on invoices received from the PM or consultants.**
- **Match consultant invoices to consultant contracts for contract dates, billing amounts and totals. If accurate, return to PM or submit to Comptroller's Office for payments.**
- **Enter invoice, pin, parcel on payment tracking spreadsheet on Google drive.**