



## **TABLE OF CONTENTS**

TABLE OF CONTENTS.....	1
1.0 INTRODUCTION.....	5
1.1 About This Manual .....	5
1.2 READS™ Overview .....	5
1.3 WISDOT’s READS Administrator.....	5
1.4 BEM’s Technical Support.....	6
2.0 GETTING STARTED .....	7
2.1 READS Log-In .....	7
3.0 MENUS AND BUTTONS .....	9
3.1 Menus.....	9
3.2 Buttons .....	11
4.0 COMMON FEATURES .....	12
4.1 Edit, Save, and Cancel Buttons.....	12
4.1.1 Edit and Save Buttons.....	12
4.1.2 Cancel Button .....	13
4.2 Attaching Documents.....	13
4.3 Label Colors and Field Background Colors.....	14
5.0 LOG .....	14
5.1 Adding Comments .....	15
5.2 Attaching Documents.....	17
5.3 Sending Email.....	18
6.0 PROJECT DETAILS .....	19
6.1 Projects.....	19
6.1.1 Plat Summary Tab .....	25
6.1.2 Cost Allocation Tab .....	29
6.1.3 Parcels Tab.....	35
6.1.4 Construction IDs Tab.....	38
6.1.5 Assignments Tab.....	40
6.1.6 Appraisal Assignment.....	41
6.1.7 Appraisal Comps Tab .....	42
6.1.7 Relo Comps Tab .....	45
6.1.8 Payment Tab .....	48
6.1.9 Documents Tab .....	49
6.1.10 Log Tab.....	49
7.0 PARCEL CENTRAL .....	49



7.1 Parcel Information.....	50
7.2 Acquisition Team.....	52
7.3 Participants.....	54
7.4 Interests .....	57
7.5 Waiver of Appraisal .....	58
7.5.1 Allocation Tab .....	59
7.5.2 Comparables Tab .....	62
7.5.3 Log Tab.....	63
7.6 Appraisal .....	65
7.6.1 Status Tab .....	66
7.6.1 Allocation Tab .....	66
7.6.4 Comparables Tab .....	70
7.6.5 Obj Review Tab .....	70
7.6.6 Checklist Tab .....	71
7.6.7 Review Details Tab.....	72
7.6.8 Documents Tab .....	75
7.6.9 Diary Tab .....	75
7.6.10 Log Tab.....	76
7.7 Owners Appraisal.....	77
7.7.1 Allocation Tab .....	78
7.7.2 Log Tab.....	81
7.8 Offer/Negotiations .....	81
7.8.1 Negotiations Details.....	82
7.8.2 Offers .....	83
7.8.3 Pro Rata Taxes Tab.....	86
7.8.4 Mortgage Release Tab .....	88
7.8.5 Recording Tab .....	90
7.8.6 Documents Tab .....	91
7.8.7 Diary Tab .....	91
7.8.8 Log Tab.....	92
7.9 Negotiation Diary.....	93
7.10 Additional Parcel Costs.....	93
7.11 Relocation .....	94
7.11.1 Details Tab.....	95
7.11.1 Subject Prop Tab.....	96
7.11.2 Comparables Tab .....	97



7.11.3 Replacement Tab .....	99
7.11.4 Computations Tab.....	99
7.11.5 Pymt Summary Tab .....	101
7.11.6 Claims Tab.....	102
7.11.7 Documents Tab .....	103
7.11.8 Diary Tab .....	104
7.11.9 Log Tab.....	104
7.12 Buildings/Structures.....	105
7.12.1 Details Tab.....	106
7.12.2 HazMat/InspTab .....	107
7.12.3 Maintenance Tab .....	108
7.12.4 Saleable Items Tab.....	109
7.12.5 Payment Info Tab .....	110
7.12.6 Documents Tab .....	112
7.12.7 Log Tab.....	113
7.13 Parcel Log .....	113
7.14 Litigation.....	115
7.14.1 Disposition Tab.....	115
7.14.2 Witnesses Tab .....	117
7.14.3 Case Report Tab .....	118
7.14.4 Interest Calc Tab.....	119
7.14.5 Documents Tab .....	120
7.14.6 Diary Tab .....	120
7.14.7 Log Tab.....	121
7.15 Payment Request.....	121
<b>8.0 LEASES.....</b>	<b>126</b>
8.1 Adding a Lease/Leaseback.....	126
8.2 Details Tab .....	130
8.3 Payment Info Tab.....	131
8.4 Terms Tab .....	132
8.5 Assignment Tab .....	133
8.6 Documents Tab .....	134
8.7 Log Tab.....	134
<b>9.0 LAND INVENTORY .....</b>	<b>134</b>
9.1 Add New Land Inventory.....	137
9.1.1 Split Parcels .....	141



9.1.2 Surplus Land Appraisals .....	142
9.2 Details Tab .....	142
9.2 Sales Status Tab .....	144
9.3 Potential Bidders Tab .....	144
9.4 Disposition Tab .....	145
9.5 Assignment Tab .....	146
9.6 Payment Info Tab .....	146
9.7 Maintenance Tab .....	147
9.8 Documents Tab .....	148
9.9 Diary Tab .....	150
9.10 Log Tab .....	150
10.0 COMPARABLES .....	152
10.1 Add New Comparable .....	152
10.2 Additional Info tab .....	154
10.4 Documents Tab .....	154
10.5 Log Tab .....	156
11.0 E-HELP .....	157



## **1.0 INTRODUCTION**

### **1.1 About This Manual**

This manual introduces the main features and operations of the web-based Real Estate Automated Database System (READS) and explains how to begin using the application. This manual was specifically designed for the Wisconsin Department of Transportation (WisDOT) to assist in managing the process of real estate property acquisition. It also provides complete descriptions of the components and features of READS and presents instructions and examples.

This manual is intended for the sole use of WisDOT and should not be distributed to anyone without prior authorization from the WisDOT system administrator.

### **1.2 READS™ Overview**

WisDOT's READS is a web-based application developed by BEM Systems, Inc. (BEM) to track and manage all phases of property acquisition specific to WisDOT workflow processes. READS can also be used as a project management tool to track the acquisition process beginning with the initial parcel selection, title search, appraisal, offer to acquire, closing and potential condemnation proceedings through demolition and property management.

READS simplifies and reduces the time and costs associated with the acquisition process by:

- Providing a platform to standardize the acquisition activities across different WisDOT departments, consultants and property acquisition teams;
- Tracking critical milestones and costs related to the acquisition of a parcel, as well as the impact to the overall project schedule and budget;
- Serving as a central repository of all project data, documents, photos, drawings and maps that can be accessed by all stakeholders on the internet or intranet in a secure manner;
- Automating the production of standard form letters, transmittals, and reports needed to manage the acquisition process on a day-to-day basis; and
- Integrating the environmental design, appraisal, construction management and maintenance information in one powerful and scalable database.

### **1.3 WISDOT's READS Administrator**

The overall System Administrator for WisDOT is:

Camille Wilcox  
Wisconsin Department of Transportation  
Central Office  
Camille.wilcox@dot.wi.gov



#### **1.4 BEM's Technical Support**

For Technical Support use the e-Help, described in Section 13.0, or please contact:

Ritesh Shah BEM  
Systems, Inc.  
[rshah@bemsys.com](mailto:rshah@bemsys.com)



## 2.0 GETTING STARTED

### 2.1 READS Log-In

The web address for the Log-In webpage is:

<https://reads.dot.wi.gov/Home/Main> and the following screen will open:



If you are a DOT Staff then you should click on the Staff button and will require your Azure AD username and password.

If you are a DOT Consultant then you should click on the Consultant button and will require your My Wisconsin username and password.

You can also access the READS application through the READS launch page below:

#### READS Launch Page

Bookmark, or create a desktop shortcut, to the READS Launch Page

[https://trust.dot.state.wi.us/extntgtwy/dtid\\_real\\_estate/repm/reads](https://trust.dot.state.wi.us/extntgtwy/dtid_real_estate/repm/reads)

Access the READS Launch page via the Consultant Extranet



WISCONSIN DEPARTMENT OF TRANSPORTATION [Home](#) | [News](#) | [About Us](#) | [Research & Library](#) | [A-Z Index](#)


**Doing Business**

[Drivers & Vehicles](#) | [Safety](#) | [Travel](#) | [Plans & Projects](#) | [State Patrol](#) | [Doing Business](#) | [Programs for Local Gov't](#)

[Civil rights and compliance](#)  
[Design and construction](#)  
[Economic development](#)  
[Map and publications orders](#)  
[Purchasing](#)  
[Rules, permits and licenses](#)  
[Training](#)  
[Wisconsin surplus land for sale](#)

**Doing Business**

- **Civil rights and compliance**  
Title VI and Americans with Disabilities Act (ADA)
- **Design and construction**  
Information and manuals used for bidding on construction projects and soliciting for design engineering and related services. Also, information on how businesses can thrive during construction.
- **Economic development**  
Information about WisDOT activities that act as a catalyst for economic development.
- **Map and publications orders**  
Order state and county maps, safety materials and other publications.
- **Purchasing**  
Check out what the department buys and how to become a vendor.  
[Minority Business Enterprise program](#)
- **Rules, permits and licenses**  
Special licenses, permits, inspections, or those who want to do work along the highway right of way. Find out what's needed to keep you in compliance.
  - o [Motor carriers](#)
  - o [Motor vehicle dealers](#)
  - o [Financial institutions](#)
- **Training**  
Listing of training courses currently available to consultants and contractors.
- **Wisconsin surplus land for sale**



**Related business items:**

[Consultant extranet](#)  
[Extranet FAQ](#)  
[Notaries public](#)  
[Traffic counts](#)

WISCONSIN DEPARTMENT OF TRANSPORTATION [Home](#) | [News](#) | [About Us](#) | [Research & Library](#) | [A-Z Index](#)

**Doing Business**

[Consultant Home](#) | [Docs & Forms](#) | [Notices](#) | [Standards & Tools](#) | [Search Consultant site](#)

[Consultant home](#)  
[Contact us](#)  
[WisDOT staff telephone directory](#)

**READS (Real Estate Automated Data System)**

Please bookmark this page.

Access to the READS system is limited to WisDOT staff and consultants actively working on WisDOT Real Estate projects. Please direct questions regarding the READS system to [drew.kottke@dot.wi.gov](mailto:drew.kottke@dot.wi.gov).

- **READS is available:** [Enter READS](#)

Note: READS will be undergoing scheduled maintenance and unavailable on Sunday, December 12, 2010.

[Extranet system requirements](#)

Questions about the content of this page, contact:  
Drew Kottke, [drew.kottke@dot.wi.gov](mailto:drew.kottke@dot.wi.gov)  
Last modified: November 1, 2010

A MyWisconsin ID and password for consultants and a Azure AD username and password are required to access READS, which is issued by Wisconsin Department of Transportation. Once logged in and the following screen will open:

For DOT Staff, the DOT office will be selected by default based on which Region office the user belongs to:





Project Listing

Responsible DOT Office	Work Performed By	Project ID	Project Name	Project Highway	Project Counties	Parcels on Project	Project Type	Edit	Delete	Admin Delete
Madison	Madison	5290-01-21	MAIN STREET, VILLAGE OF WAUNAKEE	STH - 019	Dane	16	State			
Madison	Madison	1011-04-24	MADISON - PORTAGE	IH - 039	Dane	4	State			
Madison	Madison	3042-00-23	LOWELL - HARTFORD	STH - 060	Dodge	7	State			
Madison	Madison	1370-02-27	WATERTOWN - WAUKESHA	STH - 016	Jefferson	5	State			
Madison	Madison	5155-05-21	MADISON - EVANSVILLE	USH - 014	Dane	2	State			
Madison	Madison	6085-00-21	IH 39 - SUN PRAIRIE	STH - 019	Dane	4	State			
Madison	Madison	5992-01-27	CENTRAL PARK, CITY OF MADISON	NON - HWY	Dane	1	LPA			
Madison	Madison	1674-01-22	LAKE DELTON - SAUK CITY	USH - 012	Sauk	3	State			
Madison	Madison	1066-03-24	MADISON - LAKE MILLS	IH - 094	Dane	0	State			

Page 1 of 34 1 - 10 of 334 items

For Consultant Users:

Project Listing

Responsible DOT Office	Work Performed By	Project ID	Project Name	Project Highway	Project Counties	Parcels on Project	Project Type	Edit	Delete	Admin Delete
No items to display										

Page 0 of 0


### 3.0 MENUS AND BUTTONS


This section provides brief descriptions of each command on the READS™ main menus and buttons. Where appropriate, it provides references to other sections of the manual for more information.

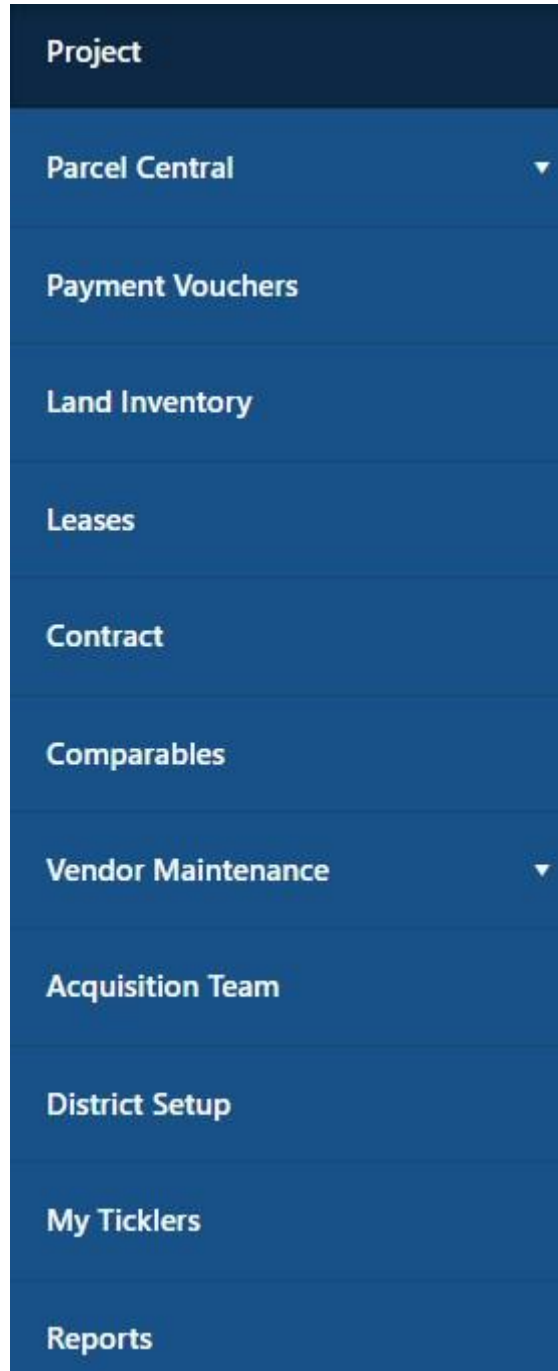
#### 3.1 Menus

By default, the following screen will show up:



To collapse the menu items and view only the main menu items, click the minus sign () and the choices under each item will disappear as shown on the right below.

To view and access the submenu items again, click the following icon () and the choices under each item will reappear. Click on the form you want, and it will open on the right-hand side of your screen.



### 3.2 Buttons

The following are buttons that are located throughout the READS application with descriptions of their uses and functions. There are more buttons than what is listed below; however, the following are the most common buttons and are similar to the others found throughout READS.



The Edit button is located on each of the forms in READS. The form is disabled until you click on the button. To make changes, you must click on this button to activate the form.



The Edit button is found on the tables throughout READS under the View heading. Click this button to view the information for the entry in that row of the table.



Once you have entered the desired information into a form, you must click this button to save the information and activate changes.



Clicking the Cancel button will cancel the current action and not save changes made.



This is the Delete button that is found on the tables throughout READS. Click this button if you want to delete the entry in the table for that row.



This is the calendar button, which appears next to all fields where requiring a date entry. Clicking on this icon will open a calendar, from which you can select a date by clicking on it. The date field will automatically input the current day's date when clicked twice.

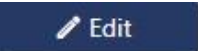


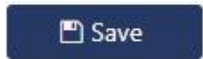
This button is found several places throughout READS and is used to return to the previous screen.

## 4.0 COMMON FEATURES

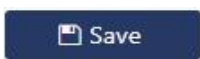
There are several features of READS that are the same throughout the program. These features include Edit/Save/Cancel/Print functionality, attaching documents, e-mailing documents, and generating documents. The following sections outline how to use these different features.

### 4.1 Edit, Save, and Cancel Buttons

You will notice throughout READS that there is an edit  button, or save

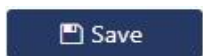


and cancel

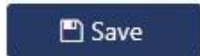


buttons at the top of many of the screens

The edit, save, and cancel buttons control commitment of data to the database. The cancel



and save



buttons are visible once the edit



button


has been clicked and the user is in edit mode. Once in edit mode, the program limits the user's ability to move to other program functions until the user exits the edit mode by saving changes or canceling the changes.

#### 4.1.1 Edit and Save Buttons

READS requires data entry and updating to be performed while in "Edit Mode". Select the edit

button 

to enter into edit mode. This feature is a safeguard to prevent accidental

overwriting of data. When you click the edit button , this enables the fields of the form that you are working on and disables all other menu items. This way, you cannot click on a menu item to go to a different screen without saving the information entered. While in edit

mode, save




and cancel



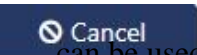
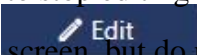
buttons will be shown. Once the desired




information has been entered, click the save button to save the entries and exit edit mode, enabling the Menus and disabling the forms. Clicking the cancel button

 will also allow you to exit edit mode, and data entered or changes made will not be saved.

#### 4.1.2 Cancel Button

The cancel button  can be used to stop editing or to go back to a previous screen. If you have clicked the edit button  on a screen, but do not want to make changes

or save the changes you have made, click the cancel button  to enable the menu items and go to a different screen.

### 4.2 Attaching Documents

READS gives you the option to attach documents in several locations within READS and within the appropriate sections of the Log. These documents will be saved on the server hosting the program, so that users can access these documents as needed throughout the acquisition process. These documents can include reports, memos, letters, etc. The Log is accessed from the many modules within the system such as, Appraisal, Offer/Negotiation, Property Management, and Relocation, etc.

Click on the Add Attachment button and the following screen will appear:



The screenshot shows a form for attaching documents. It includes the following fields and controls:

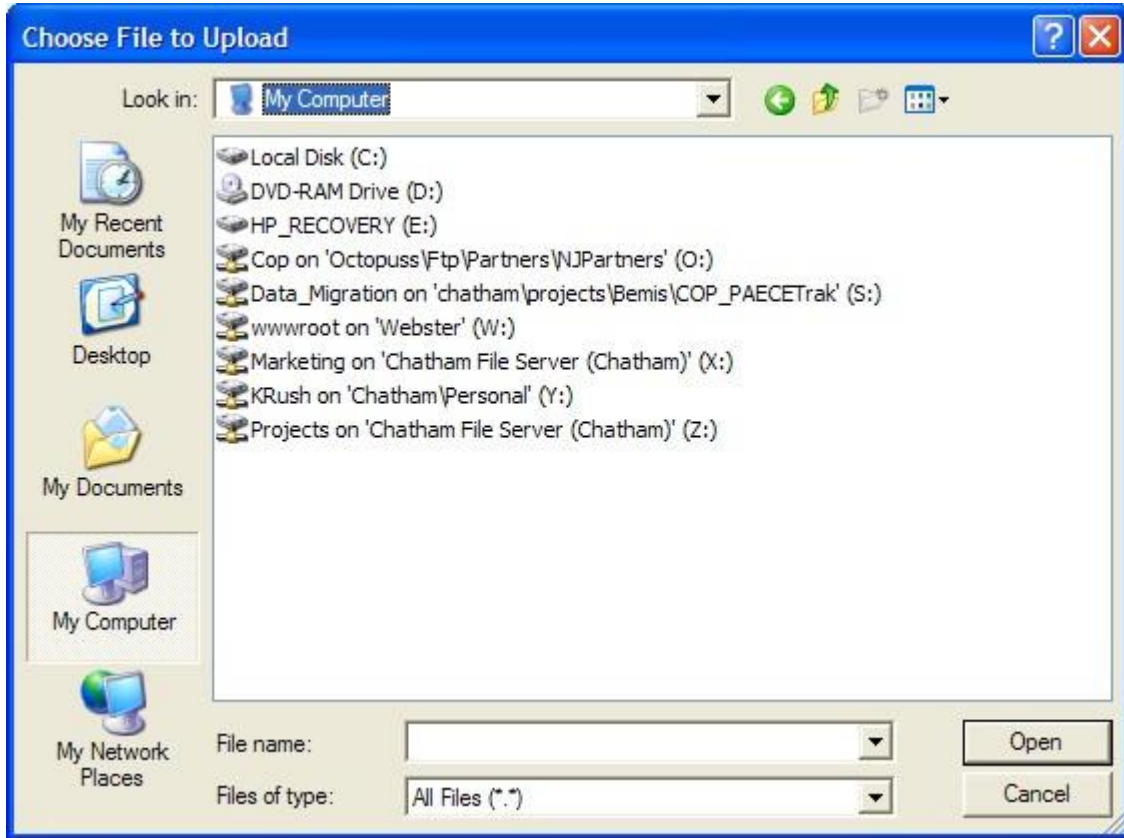
- Upload Date \***: A date input field containing "04/12/2024" with a calendar icon and a close button (x).
- File Name \***: A text input field with a "Select files..." button.
- Subject \***: A text input field.
- Description**: A larger text input field.

From this screen, you can attach the document as well as provide details. To attach the



Select files...

document, click the Select Files button, which will open a standard Microsoft dialogue box where you can search for the file:



Once you have located the desired file, you can double click on it, or click once and then click on the Open button. The file path will now appear in the Document field. You then need to enter the Preparation Date, Document Type, and Title of the document.

### 4.3 Label Colors and Field Background Colors

Throughout READS, you will notice that some labels and field background colors are different. If you hold your mouse over certain fields, a tooltip will pop up to explain the field.

Fields with a dark grey background, as shown below are read-only and are not able to be updated. This means that the data has been entered elsewhere in READS or is a calculated field and cannot be edited on the screen you are viewing.

Fields that are required to be filled in to be able to save the data entered on the form have a red asterisk next to the label names as shown below: Project ID \*


## 5.0 LOG

This section provides instructions on how to use the Log. The Log is found throughout the



























READS database. Most modules within the Parcel Menu each have their own Log, as do the Projects, Leases, and Land Inventory modules. Additionally, there is an overall Log, accessed from the Parcel Central Menu, for the entire parcel that includes the contents of all of the modules for that parcel. For example, it will include the Logs found in Environmental, Titles, Appraisals, Offer/Negotiation, etc.

The Log provides a record of all of the communications that have occurred. This will include comments, documents that have been generated or attached, and emails that have been sent. This is also the place to add comments, attach documents, and send emails, which is discussed further in the following subsections. There are two ways to access the Log:




1. Within screens that have tabs in the mid-portion of the screen, the Log will have its own tab and can be accessed by clicking the Log tab.
2. On other screens there will be a Log button  Log on the screen, which will open the Log in a separate window.

Regardless of the module you are in or if you are in the overall Log, the mechanics of how the Logs work are the same. When you open the Log you will see the following form:

				+ Add Call Data		+ Add Notes		+ Add Attachment		+ Send Email	
Date	Type	Subject	View	Edit	E-Auth	Delete	Admin	Delete			
04/11/2024	Document	Project Cost Allocation/Encumbrance (RE1532)									
04/11/2024	Document	Project Cost Allocation/Encumbrance (RE1532)									
04/12/2019	Call Data	Closing PCA not necessary									
07/20/2017	Document	PCA									
07/17/2017	Document	PCA									

Page 1 of 7 1 - 5 of 31 items

There can be many entries in the Log. To page through the Log you would use the arrow buttons located at the bottom of the form.

If the item in the Log is a document, there will be an open button  in the Open column that you can click to open the document. The delete button  is used to delete the item from the Log if given the security access to do so. To view or edit the details associated with a Log item, click the edit button .

There are also several buttons along the top of the Log screen provided to initiate records of communication including diary items, comments, attach documents, and send emails. The following sections outline the functions of these buttons.

### 5.1 Adding Comments

When you click the add notes button, the following window will open:



The screenshot shows a web form with the following elements:

- Top right: **Save** and **Cancel** buttons.
- Field 1: **Communication Date \*** with a value of **04/22/2024** and a calendar icon.
- Field 2: **Subject \*** (required field).
- Field 3: **Description** (optional field).
- Field 4: **Created On** (disabled).
- Field 5: **Created By** (disabled).
- Field 6: **Updated On** (disabled).
- Field 7: **Updated By** (disabled).

The current date will be filled in by default but can be edited if necessary. The Subject is a required field and must be entered. The Description is not required but should be entered.

Once you have completed entering data, click the save button. If you do not wish to save the data you have entered, click the cancel button.





## 5.2 Attaching Documents

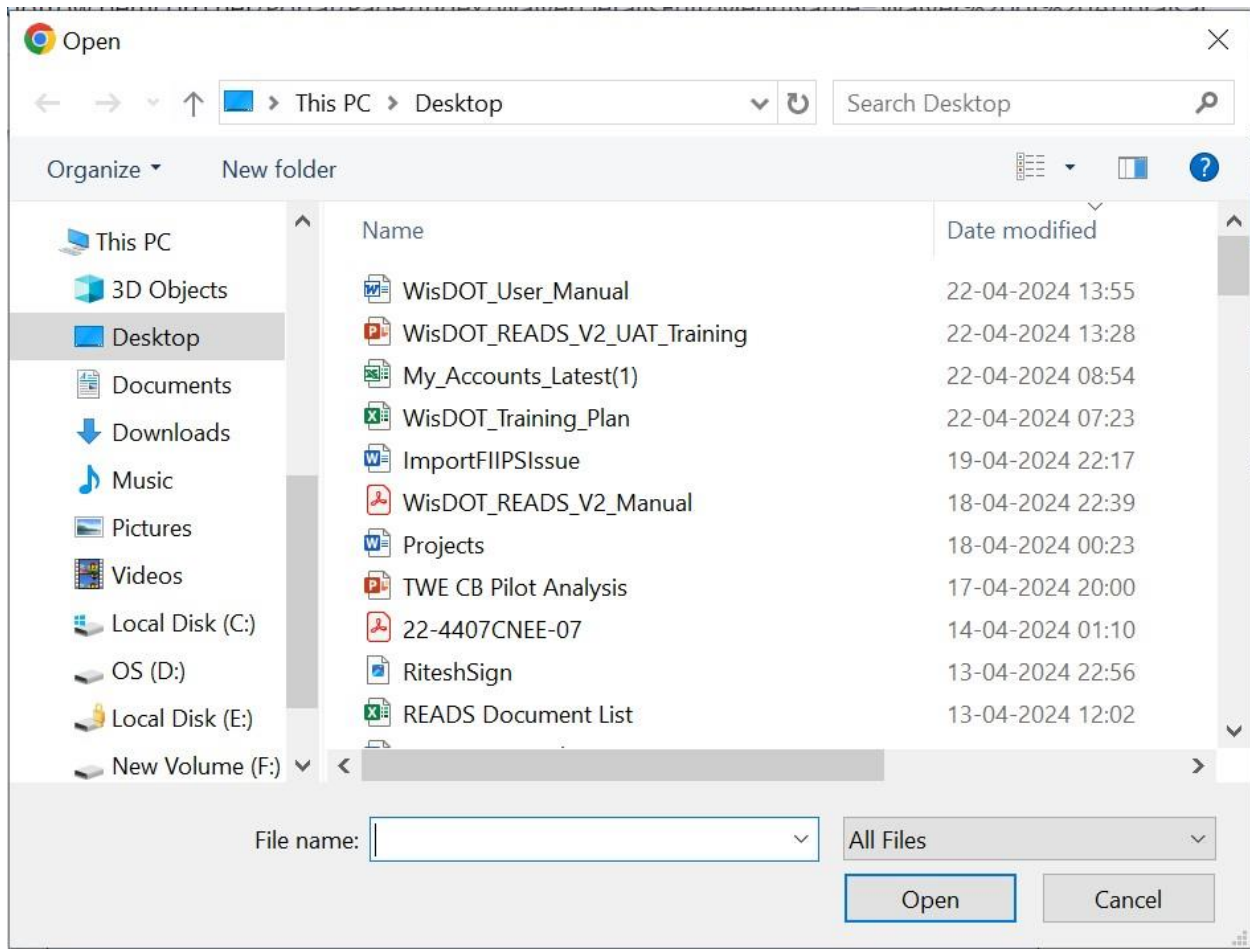
The Log will contain any documents that have been generated by the system. Additionally, you can attach additional documents by clicking the button Add Attachment , which will open the following form:

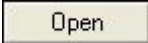
The screenshot shows a web form for attaching documents. At the top right, there are two buttons: 'Save' and 'Cancel'. The form contains the following fields:

- Upload Date \***: A date input field containing '04/22/2024' and a file icon with an 'x'.
- File Name \***: A text input field with a 'Select files...' button.
- Subject \***: A text input field.
- Description**: A larger text input field.

The Upload Date field is automatically filled in with the current date but can be edited if needed. The Subject field is required and must be entered before attaching the document. The Updated On and Updated By fields are populated automatically by the system once the document is saved and attached. The Description field is not a required field but should be entered whenever possible.

You can attach any document that is available from your desktop (located on your computer or available from a network drive). However, to open that document you must have the corresponding software loaded on your computer. For example, you can attach an Excel document but if you want to open it you must have the corresponding version of Microsoft Office or Excel installed on your computer. To locate a file or document you would like to attach, click the Select files button, which will open a standard Microsoft dialog box where you can search for the file:



Once you have located the desired file, you can double click on it, or click once and then click on the Open button . This will then place the file's name and path in Document textbox. Once you have completed entering the required information and are ready to upload and attach the file, click on the save button. This may take several seconds or minutes depending on the size of the file. Once the system has completed uploading and saving the document a message indicating "File uploaded successfully" will appear and the document will be added to the Log. If you decide you do not want to continue with this process click on the cancel button.

### 5.3 Sending Email

When you click the send email button, the following form will open:

The "To" and "Subject" fields are required. To populate the To, Cc, and Bcc fields, you can enter the email address(es) in the textboxes provided



The screenshot shows an email composition form with the following fields and buttons:

- To:** \* (Text input field, with a note: "(use : separator for multiple email addresses)")
- CC:** (Text input field)
- BCC:** (Text input field)
- Subject \*** (Text input field)
- Message** (Text input field)
- File Attachments** (Text input field)
- Created On** (Text input field)
- Created By** (Text input field)
- Updated On** (Text input field)
- Updated By** (Text input field)
- Buttons:** Send Email, Cancel, Attach

Once you have entered all desired information, click the send button. If you do not wish to send the email, click the cancel button.

You can also attach documents from the log in the email. To do this click on the Attach button and will show list of documents from the Log you can attach the documents in the email.

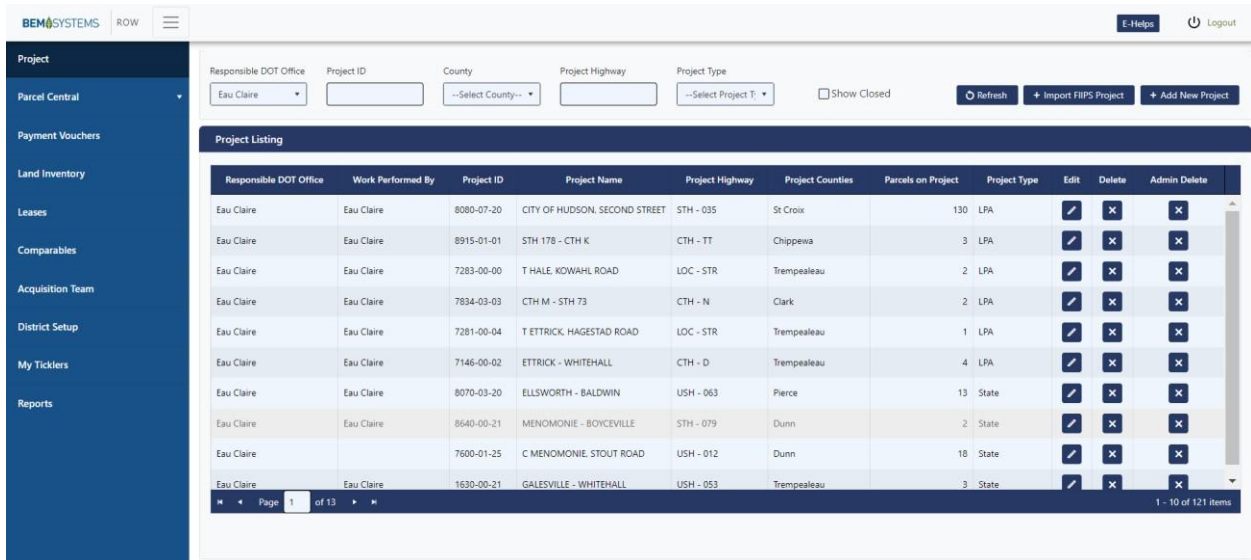
Next, click the send email button and follow the instructions above for sending emails. You will notice that there are now files listed in the File Attachments field:

Once the email is sent, the Log will update with the email record.

## 6.0 PROJECT DETAILS

### 6.1 Projects

READS provides the capability to maintain high-level project information. To access the real estate projects, click Project on the Left Menu and the following will open:



(Screen 6.1)

The list shows all the projects that have been added to the READS system. Along the top of the screen, there are dropdown filters for Responsible DOT Office, County, Project Type as well as a textbox for Project Highway and Project ID. You can use these dropdowns to filter the list and then hit refresh to apply the filters so that it is easier for you to locate the project you are looking for. By default, the Responsible DOT Office filter will be filled in by the Region office the logged in user belongs to. For consultants and Central office staff no filtering will be applied by default and the list will show all the projects within real estate. By default, only projects which are not closed will show up in the list. If you need to reference the closed project, check the Show Closed Projects checkbox and hit refresh and the list will show all projects including the closed projects.

To view the details of a project, click the Edit button in the row of the desired project.

To delete a project, you click the delete button in the delete column. This button is security controlled and not all the users will have the ability to delete a project. If you do not have the ability to delete a project, you will not see the delete button.

**Adding a new State Project:**

1. Import FIIPS Project (State and LPA Projects)
2. Add New State Project (Not in FIIPS)

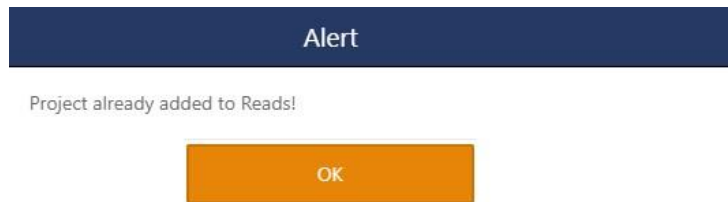
**1. Import FIIPS Project (State Projects)**

- a. On the Project Details screen
- b. Click on Import FIIPS project and the following dialog will open:

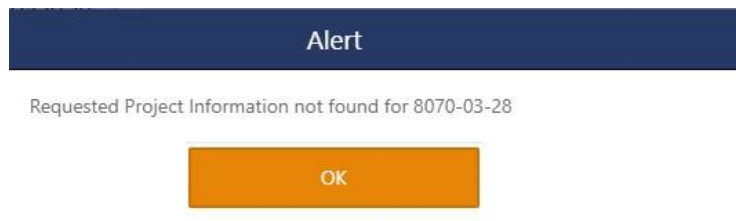




- c. Select the option based on whether you want to import the real estate or non real estate project.
- d. Please enter a valid 8 digit Project ID and hit the Import button. If the Project ID is already in READS the following message will pop up:



If you enter a Project ID which is not in FIIPS the following message will show up:



If a Project ID exists in FIIPS and has not been already imported in READS the following project detail screen will show up:

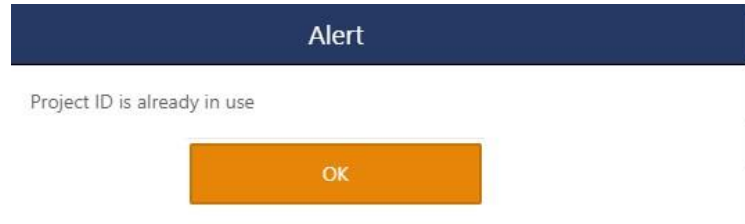


## 2. Add New State Project (Not in FIIPS)

On Screen 6.1 above click on Add New Project and the following popup will show up

In order to create the project, you must enter the Project ID, Project Name, choose the Responsible DOT Office, enter the highway and Project Tye.

If you try to enter a Project ID already entered in READS the following message will pop up:



Click the save button to add the project and the screen will refresh to show the data entered by the user. Construction ID related data will only be entered once the basic information about the Project has been added to the system.

In order to add Construction IDs and the letting dates click Add New next to the Construction IDs section and the following screen will pop up:

Please enter a valid 8 digit construction id with or without dashes and other relevant data and click the Save button. You can add multiple Construction IDs for a project



If a Project is imported from FIIPS many of the fields will be read only as they will be pulled from the FIIPS system. See screen below:

The screenshot shows the 'Project Information' form in the BEM SYSTEMS application. The form is divided into several sections: 'Project Information' at the top with fields for Responsible DOT Office (Eau Claire), Project ID (8640-00-23), Project Name (MENOMONIE - CONNORSVILLE), Project Highway (STH - 079), and Project Type (State). Below this is a navigation bar with tabs for Project Details, Plat Summary, Role Plan, Construction IDs, Cost Allocation, Parcels, Role Assignment, Appraisal Assignment, Appraisal Comps, and Role Comps. The main content area includes sections for FIIPS Subprogram (303 - State Highway Rehabilitation), Work performed By (Eau Claire), Project Counties (Dunn), Cert Status, Cert 1 Date, Project Termini (CLACK CREEK BRIDGE B-17-0143), Report Code, Sales Study Approved, Final Parcel Closed, and Closed for Charging. There is also a section for FIIPS Concept (BRBPL - Bridge Replacement, Preservation), Agency to appear on Docs, # of Parcels, # Acquired Parcels, Federal ID, and Design ID. A table at the bottom shows 'No items to display' for Construction IDs. The RE Funding % section shows Federal (0.00), State (100.00), County (0.00), and Local (0.00).

The following fields are pulled from the FIIPS system:

- Project ID
- Project Name
- FIIPS Subprogram
- Project Termini
- Project Highway
- FIIPS Group
- FIIPS Concept
- Responsible DOT Office
- RE Funding (%)
- Closed for Charging
- Federal ID
- Design ID
- Project Counties
- Construction IDs
- PSE Dates (PSE Date, Earliest PSE Date and PMP PSE Date)

The READS system will get updated by a nightly batch process from FIIPS in order to show the latest project information in READS from the FIIPS system.





### 6.1.1 Plat Summary Tab

When you click on the Plat Summary Tab the following screen will show up and the TPP screen will open up by default:

**Project Information**

Responsible DOT Office: Waukesha | Project ID: 1310-10-24 | Project Name: 75TH ST, C KENOSHA/V PLEASANT PRAIR | Project Highway: STH - 050 | Project Type: State

Buttons: Remove Import from FIIPS, Export, + Back

---

**Navigation Tabs:** Project Details | **Plat Summary** | Relo Plan | Construction IDs | Cost Allocation | Parcels | Role Assignment | Appraisal Assignment | Appraisal Comps | Relo Comps

**Sub-Tabs:** TPP | Filed Plat

Total Plat Sheets: 14 | + Add Plat Sheet

Amend Sheet	Sheet	Amendment	Parcels	Relocation Order Date	Edit	Delete
+	4.03	0	107,108,109,110,111,112,113,258,259,265	02/28/2019		
+	4.04	0	112,157,159	04/30/2019		
+	4.05	0	162,163	04/16/2019		
+	4.06	0	112,117,164,165,166,167,260,266,270	04/30/2019		
+	4.07	0	159,168,169,170,171,172,173,174,175,267,269	04/30/2019		
+	4.08	0	176,177,178,179,180,181,182,183,184,185,261,262,268	05/28/2019		

Page 1 of 3 | 1 - 10 of 22 items

Click on Add Plat Sheet in order to add a new TPP plat sheet and the following popup will open up:

**Add/Edit Plat Sheet** [Close]

Save | Cancel

Sheet \*

Amendment

Parcel

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Co-ordinates

Xmin  Xmax

Ymin  Ymax


Relocation Order Date

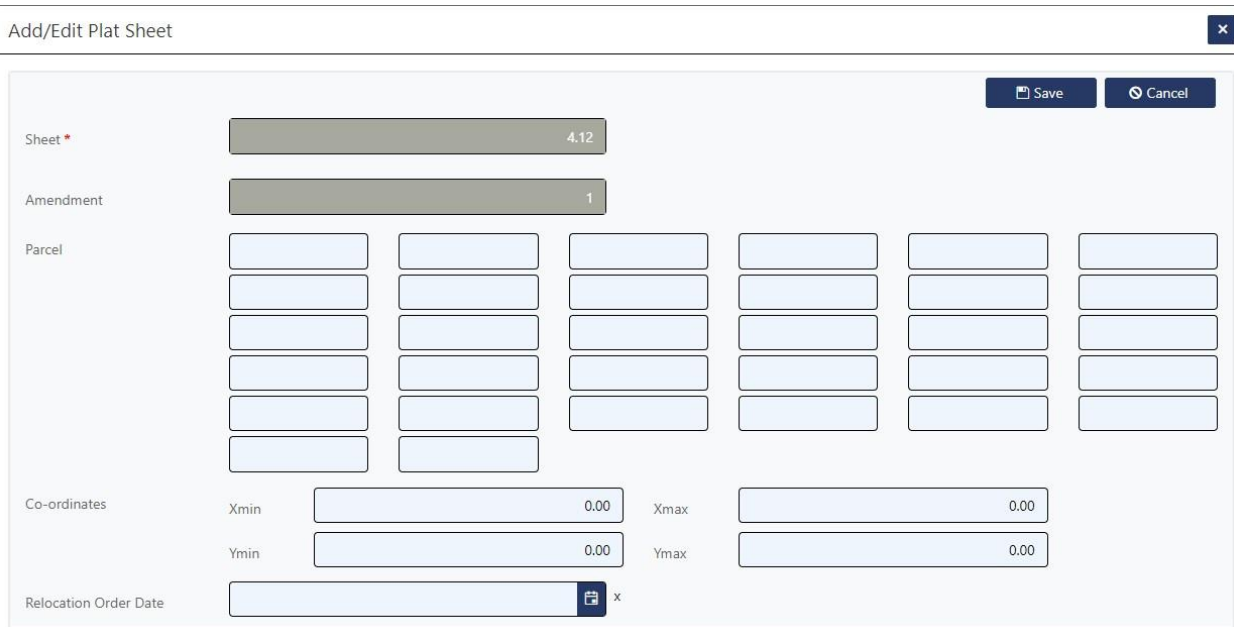




You must enter a Plat sheet number and at least one parcel that is on the plat sheet in order to save the information. You can enter multiple parcels that are on the plat sheet and a Relocation Order date. The Amendment is a read only field which shows up as 0 by default which indicates it's the original plat sheet and will auto increment when amendments are done to the plat sheet. The system allows entering maximum of 32 parcels on a plat sheet as shown below:

Once the information is entered you can click the Save button to Save the Plat Sheet and create the acquisition parcels that are on the plat sheet and the plat sheet information.

In order to make amendments to a plat sheet click on the Amend button  for the respective plat sheet and the following screen will show up:



The screenshot shows a web form titled "Add/Edit Plat Sheet" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Sheet**: A text input field containing "4.12".
- Amendment**: A text input field containing "1".
- Parcel**: A grid of 32 empty text input boxes arranged in 6 rows and 6 columns.
- Co-ordinates**: Four text input fields for Xmin, Xmax, Ymin, and Ymax, each containing "0.00".
- Relocation Order Date**: A text input field with a calendar icon and a small "x" button to the right.
- Buttons**: "Save" and "Cancel" buttons are located in the top right corner of the form area.

To view the details of a TPP plat sheet, click the edit button in the row of the plat sheet.

To delete a plat sheet, you click the delete button in the delete column.

**NOTE:** This will only delete the plat sheet information but not the acquisition parcels (if any) created in the system.

If a project has a filed plat then click on the Filed Plat screen within the Plat Summary tab and the following screen will open up:



In order to add parcels to the filed plat click on the Add Parcels button and the following screen will show up:

You can enter each parcel on a filed plat or check the Specify Range checkbox in order to enter a range of parcel on a filed plat as shown below:

Parcels Entered Separately



Add/Edit Parcels

Specify Range

Parcel						

Save Cancel

### Range of Parcels

Add/Edit Parcels

Specify Range

Parcel  to

Save Cancel

Once the parcels are entered click on the Save button in order to Save the information and create acquisition parcels and also saves the filed plat information in the system.

You can click on the edit button in the table to edit any of the parcels entered for the filed plat.

To delete the parcels entered for a filed plat, you click the delete button in the delete column.

NOTE: This will only delete the record entered for the filed but not the actual acquisition parcels (if any) created in the system

The system also allows you to enter multiple revisions of the ROW Plat Date and a Relocation Order date for a filed plat when you click on the Add New button on the left portion of the Filed Plat screen:

Click on Add ROW Plat and the following dialog shows up:



## Add/Edit ROW Plat



Save
 Cancel

ROW Plat Date \*  X

Relocation Order Date  X

You must enter a ROW Plat Date in order save the information on the screen.

In order to edit any of the other information on the Filed Plat Screen click on the Edit button enter/modify the information and hit the Save button or if you do not wish to save the changes, click the cancel button.

### 6.1.2 Cost Allocation Tab

When you click on the Cost Allocation Tab the following screen will show up:

**Project Information**

Responsible DOT Office:

Project ID:

Project Name:

Project Highway:

Project Type:

[Remove Import from FIIPS](#)

[Export](#) [+ Back](#)

Project Details
Plat Summary
Relo Plan
Construction IDs
Cost Allocation
Parcels
Role Assignment
Appraisal Assignment
Appraisal Comps
Relo Comps

[+ Create Cost Allocation](#)

Version	Fiscal Year Encumb...	PO #	Encumbrance Approved by BS...	Est ROW Costs	Est Relocation Costs	Encumbered Amount	Total Delivery	Total Acquisition Cost	Edit	Delete
Revision 2	2021		01/07/2021	350,000.00	0.00	350,000.00	0.00	350,000.00		
Revision 1	2020		11/21/2019	3,450,000.00	0.00	3,450,000.00	0.00	3,450,000.00		
Original	2019		04/04/2019	1,000,000.00	0.00	1,000,000.00	0.00	1,000,000.00		

Page 1 of 1
1 - 3 of 3 Items

[+ Add Litigation](#)

Version	PO #	Encumbrance Approved by BSHP	Litigation	Edit	Delete

Account Code:

PO Balance:

PO Balance (Litigation):



STAR Vendor	PO #	Encumbrance Approved by BSHP	Encumbered Amount	PO Balance	Edit	Delete
+ Add LPA Record						
No items to display						

There are 3 different cost allocation records, ROW Cost Allocation, Litigation and one for the STAR Vendor.

Click on Create Cost Allocation to add a new Cost Allocation record and the following screen will show up within the tab:

Project Details	Plat Summary	Relo Plan	Construction IDs	Cost Allocation	Parcels	Role Assignment	Appraisal Assignment	Appraisal Comps	Relo Comps
Save Cancel									
Revision #	Fiscal Year Encumbrance		Est ROW Costs	0.00		Amount to be Encumbered			
<input type="checkbox"/> Phased	2025		Est. Relocation Costs	0.00		0.00			
Encumbrance Approved by BHSP	PO Number		Other Contracts	0.00		Total Delivery			
Comments			Est Labor Costs	0.00		0.00			
			Contract Costs	0.00		0.00			
			Delivery %	0.00		0.00			
			Total Acquisition Cost Est.	0.00		0.00			

If it's a phased project then you can check the Phased checkbox. Once you start entering the costs the Total Delivery and the Delivery % will calculate automatically based on other amounts entered on the screen. Once you are done entering all the information for allocating the cost for the project you can hit the Save button or hit the cancel button if you do not want to save any changes to the screen.

Once an original cost allocation record gets created it shows up on the Cost allocation list screen as below then only revisions can be added to the original cost allocation record.

The Revision # gets incremented as an when revisions are made to the latest cost allocation record. For the Original version the Revision # shows up as 0.

You can add multiple revisions to the cost allocation record and will show up in the screen below:

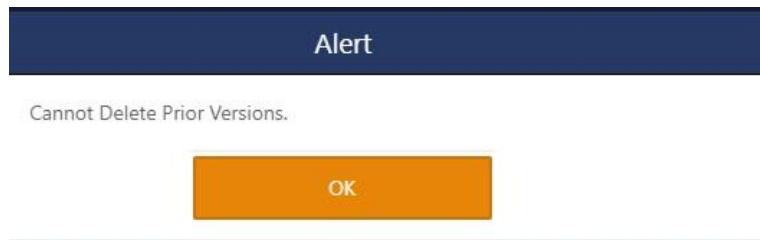


Version	Fiscal Year Encumb...	PO #	Encumbrance Approved by BS...	Est ROW Costs	Est Relocation Costs	Encumbered Amount	Total Delivery	Total Acquisition Cost	Edit	Delete
Revision 2	2021		01/07/2021	350,000.00	0.00	350,000.00	0.00	350,000.00		
Revision 1	2020		11/21/2019	3,450,000.00	0.00	3,450,000.00	0.00	3,450,000.00		
Original	2019		04/04/2019	1,000,000.00	0.00	1,000,000.00	0.00	1,000,000.00		

You can click on the edit button in the table to view/edit any of the cost allocation records entered for the project. You will not be allowed to make any changes to previous revisions or the original cost allocation records if multiple revisions are created. You can only make changes to the latest cost allocation record revised.

To delete a cost allocation record, you click the delete button in the delete column.

You can only delete the latest cost allocation record created in the system for a project, if you try to delete previous revisions you will get the following message:



The users can also generate the Real Estate Cost Allocation/Encumbrance record from this tab.

This screen also shows list of cost allocation records for Litigation as below:

Version	PO #	Encumbrance Approved by BSHP	Litigation	Edit	Delete
Litigation			0.00		



The user will click on Add Litigation button to add a new cost allocation record. The following screen will show up and the user will enter the Litigation amount to be encumbered along with PO information and the encumbrance approval date

Enter the Litigation amount and hit Save.

For the first time the record will be saved with Version as Litigation. For subsequent revisions it will save as Litigation 1, Litigation 2, etc

+ Add Litigation					
Version	PO #	Encumbrance Approved by BSHP	Litigation	Edit	Delete
Litigation 1			200,000.00		
Litigation			0.00		

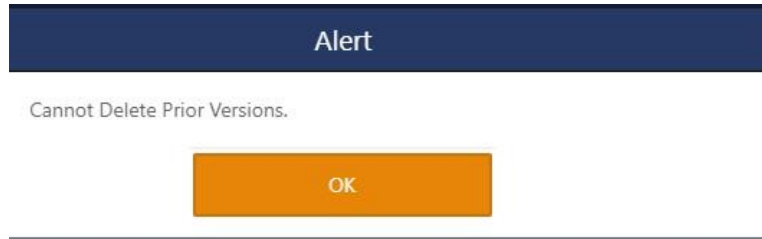
Page 1 of 1 1 - 2 of 2 items

You can click on the edit button in the table to view/edit any of the cost allocation records entered for the project. You will not be allowed to make any changes to previous revisions or the original cost allocation records if multiple revisions are created. You can only make changes to the latest cost allocation record revised.

To delete a cost allocation record, you click the delete button in the delete column.

You can only delete the latest cost allocation record created in the system for a project, if you try to delete previous revisions you will get the following message:





The users can also generate the Real Estate Cost Allocation/Encumbrance record from this tab.

The cost allocation screen also shows the cost allocation records for LPA (STAR vendors)

STAR Vendor	PO #	Encumbrance Approved by BSHP	Encumbered Amount	PO Balance	Edit	Delete
No items to display						

Click on Add LPA record to add a new cost allocation record:

Project Details | Plat Summary | Relo Plan | Construction IDs | **Cost Allocation** | Parcels | Role Assignment | Appraisal Assignment | Appraisal Comps | Relo Comps

STAR Vendor \*  +

Encumbered Amount  PO Balance

Encumbrance Approved by BSHP  PO Number

Save Cancel

To add a STAR vendor you should click on the plus icon and the following screen will show up, user can enter the text they would like to search for in the Vendor Name field and hit Refresh or the enter button and the listing will show list of STAR vendor records:



STAR Vendor Search List

Vendor Name  
Waukesha Find

Select	Vendor Name	Vendor Name (2)	Location	Address 1	Address 2	Address 3	Address 4	City	County	State
<input type="checkbox"/>	ABC of WI Waukesha		SUFFIX-B	5330 Wall Street				Madison	Dane	WI
<input type="checkbox"/>	Academy Waukesha, The		MAIN	2000 Silvernail Road				Pewaukee	Waukesha	WI
<input type="checkbox"/>	Aria of Waukesha LLC		MAIN	1451 Cleveland Ave				Waukesha	Waukesha	WI
<input type="checkbox"/>	Auto House Waukesha		MAIN	1611 Lincoln Avenue				Waukesha	Waukesha	WI
<input type="checkbox"/>	Baymont Inn & Suites - Waukesha		MAIN	2510 Plaza Ct				Waukesha	Waukesha	WI
<input type="checkbox"/>	Best Western		MAIN	2840 North Grandview				Pewaukee	Waukesha	WI

Page 1 of 16 1 - 10 of 158 items

Click on Select to select the STAR vendor the following message will appear.



STAR Vendor Search List

Vendor Name  
Waukesha Find

Select	Vendor Name	Vendor Name (2)	Location	Address 1	Address 2	Address 3	Address 4	City	County	State
<input checked="" type="checkbox"/>	ABC of WI Waukesha		SUFFIX-B	5330 Wall Street				Madison	Dane	WI
<input type="checkbox"/>	Academy Waukesha. The							Pewaukee	Waukesha	WI
<input type="checkbox"/>	Aria of Waukesha LLC			Ave				Waukesha	Waukesha	WI
<input type="checkbox"/>	Auto House Waukesha		MAIN	1611 Lincoln Avenue				Waukesha	Waukesha	WI
<input type="checkbox"/>	Baymont Inn & Suites - Waukesha		MAIN	2510 Plaza Ct				Waukesha	Waukesha	WI
<input type="checkbox"/>	Best Western		MAIN	2840 North Grandview				Pewaukee	Waukesha	WI

Alert  
Are you sure you want to continue?  
OK Cancel

Page 1 of 16 1 - 10 of 158 items

You can click on the edit button in the table to view/edit any of the cost allocation records for LPA's entered for the project.

+ Add LPA Record

STAR Vendor	PO #	Encumbrance Approved by BSHP	Encumbered Amount	PO Balance	Edit	Delete
ABC of WI Waukesha	34343433	04/11/2024	20,000.00	20,000.00		

Page 1 of 1 1 - 1 of 1 items

To delete a cost allocation record, you click the delete button in the delete column.

### 6.1.3 Parcels Tab

When you click on the Parcels Tab the following screen will show up:



**Project Information**

Responsible DOT Office: Waukesha | Project ID: 1310-10-24 | Project Name: 75TH ST, C KENOSHA/V PLEASANT PRAIR | Project Highway: STH - 050 | Project Type: State

Buttons: Remove Import from FIIPS, Export, + Back

Navigation: Project Details, Plat Summary, Relo Plan, Construction IDs, Cost Allocation, **Parcels**, Role Assignment, Appraisal Assignment, Appraisal Comps, Relo Comps

Parcel No: [ ] | Parcel Name: [ ]

Buttons: + Assign Target Demolition Dates, + Approve Nominal Offers, + Assign Target Acquisition Dates, Refresh, + Add New

Open	Remove from...	Parcel No	Parcel Name	Acq. Specialist	Relo. Specialist	Parcel Type	Closing Date	Delete
	<input type="checkbox"/>	107	WAB Holdings 70 LLC, a Wisconsin limited liability company	Joseph Casper		Intermediate	11/21/2019	
	<input type="checkbox"/>	108	AJK Holdings, LLC, a Colorado limited liability company	Joseph Casper		Intermediate	09/08/2020	
	<input type="checkbox"/>	109	Tina Antonopoulos	Debi Radtke		Major	09/08/2020	
	<input type="checkbox"/>	110	AJK Holdings, LLC, a Colorado limited liability company	Joseph Casper		Intermediate	09/08/2020	
	<input type="checkbox"/>	111	Eliminated: Wisconsin Retail Stores, LLC	Debi Radtke		Intermediate		
	<input type="checkbox"/>	112	SP Southport Plaza LLC, a Wisconsin limited liability company	Margaret Hegeman		Major	08/31/2020	

Page 1 of 10 | 1 - 10 of 100 items

This will show a list of all of the parcels that have been entered for the project by Parcel No. If you would like to go to the Parcel module, click the open button in the Open Parcel column of the table in the row of the parcel that you would like to view or enter data for.

If you need to remove a parcel from acquisition, check the checkbox in the column named Remove from Acquisition and you will not be able to view the acquisition information for the parcel.

If you need to edit or view the data for a parcel, click the view/edit button in the row of the desired parcel and the same window as shown below for the adding a new parcel will open. When the window opens, you will have to click the edit button to make updates to the data. When you have completed changing the data, click the save button or if you do not wish to save the changes, click the cancel button. You can click the back button to return to main properties screen with the list of parcels.

If you wish to delete a parcel, click the delete button in the row of the parcel that you wish to delete.

To add a new parcel from this screen, click the add new button and the following will open:



The screenshot shows a web form for entering parcel information. The form is organized into a grid of fields. At the top, there are navigation tabs: Project Details, Plat Summary, Relo Plan, Construction IDs, Cost Allocation, Parcels (selected), Role Assignment, Appraisal Assignment, Appraisal Comps, and Relo Comps. Below the tabs are 'Save' and 'Cancel' buttons. The form fields include: Parcel No \* (text input), Parcel Name \* (text input), Property Address Line 1 (text input), County (dropdown menu), Parcel Type (dropdown menu), Owner Name (text input), Address Line 2 (text input), Zoning (dropdown menu), Acquisition Type (dropdown menu), Current Status (dropdown menu), City (text input), State (dropdown menu), Zip (text input), Present Use (dropdown menu), Appraisal Format (dropdown menu), Acquisition Ready for Construction (text input with a file upload icon), Wetland Mitigation (checkbox), 4f (checkbox), 5f (checkbox), Construction ID (text input), Brochure Sent (text input with a file upload icon), Target Acq. Date (text input), Initiations of Negotiations (text input), Closing Date (text input), and a Title section containing Title Company (text input), Title Policy # (text input), and Legal Name (text input).

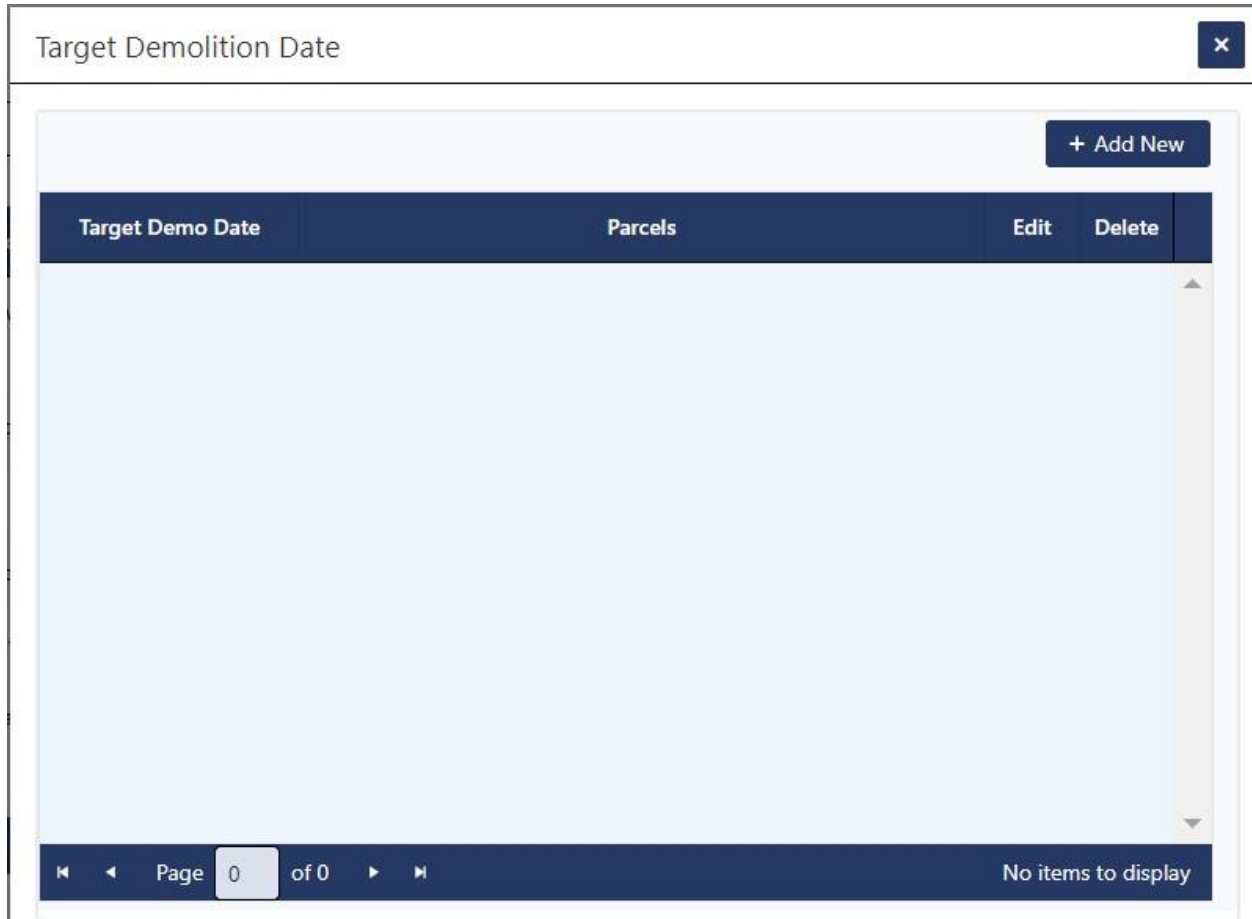
Parcel No and Parcel Names are required fields on the screen. All other data is optional to be able to save the parcel record. This “Parcel Information” screen will be discussed in further detail in Section 7.1. When you have completed entering the data, click the save button. If you do not wish to save the parcel, click the cancel button.

The screenshot shows a table of parcels. Above the table are several action buttons: '+ Assign Target Demolition Dates', '+ Approve Nominal Offers', '+ Assign Target Acquisition Dates', 'Refresh', and '+ Add New'. The table has the following columns: Open, Remove from..., Parcel No, Parcel Name, Acq. Specialist, Relo. Specialist, Parcel Type, Closing Date, and Delete. The table contains 6 rows of data:

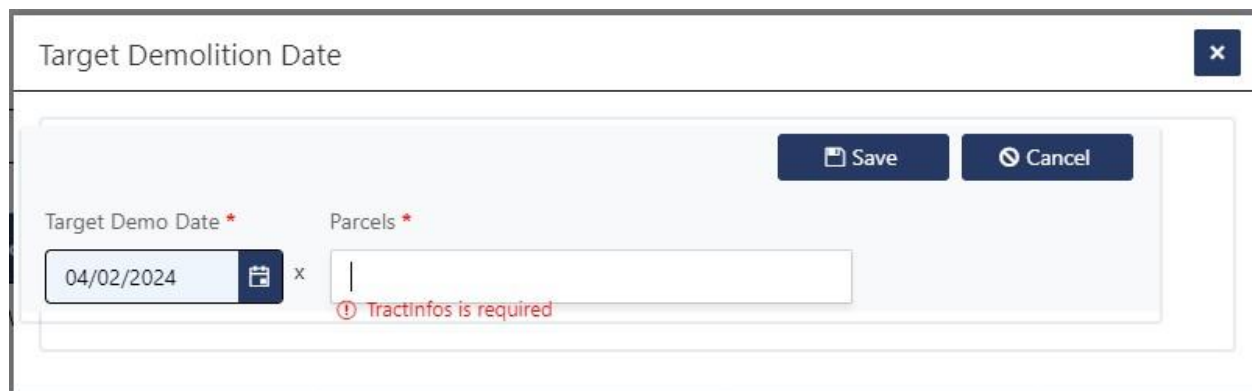
Open	Remove from...	Parcel No	Parcel Name	Acq. Specialist	Relo. Specialist	Parcel Type	Closing Date	Delete
	<input type="checkbox"/>	107	WAB Holdings 70 LLC, a Wisconsin limited liability company	Joseph Casper		Intermediate	11/21/2019	
	<input type="checkbox"/>	108	AJK Holdings, LLC, a Colorado limited liability company	Joseph Casper		Intermediate	09/08/2020	
	<input type="checkbox"/>	109	Tina Antonopoulos	Debi Radtke		Major	09/08/2020	
	<input type="checkbox"/>	110	AJK Holdings, LLC, a Colorado limited liability company	Joseph Casper		Intermediate	09/08/2020	
	<input type="checkbox"/>	111	Eliminated: Wisconsin Retail Stores, LLC	Debi Radtke		Intermediate		
	<input type="checkbox"/>	112	SP Southport Plaza LLC, a Wisconsin limited liability company	Margaret Hegeman		Major	08/31/2020	

Below the table is a pagination bar: Page 1 of 10, 1 - 10 of 100 items.

You can also assign a Target Acquisition date for multiple parcels by clicking on Assign Target Acquisition Dates and the following screen will show up:



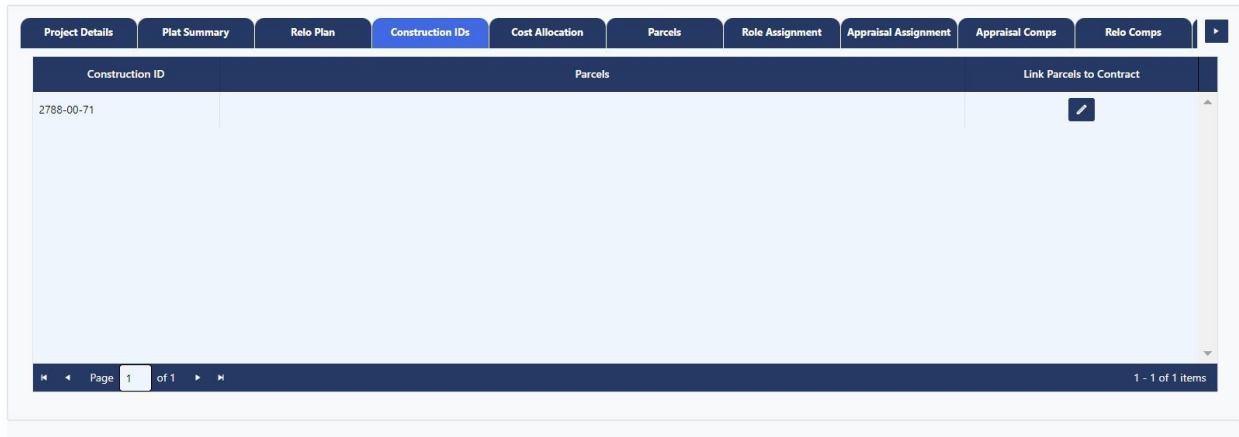
Click Add New and the following screen will show up:



Enter a Target Acq Date and select one or more parcels to apply it to: Once selected hit the save button and the parcels selected will be updated to have a Target Acq Date.

#### 6.1.4 Construction IDs Tab

When you click on the Construction IDs tab, the following will open:



This list shows all the Construction Ids added for the project on the Project Details screen. You can assign a Construction ID to multiple parcels on this screen. When you click on the Assign Parcels to Construction ID for the Construction Id you want to assign to multiple parcels the following screen will show up:



The Construction Id would show up as read only, select one or more parcels. Once selected hit the save button and the parcels selected will be updated to have the Construction Id.

You can click on the Link Parcel button to unassign Construction ID's from multiple parcels at once. When you click the following screen will show up:



Link Parcels to Construction ID
✕

Save
Cancel

Construction ID

2788-00-71

Select Parcels to Link \*

33 ✕
110 ✕
111 ✕
801 ✕
802 ✕

You can remove the parcels you want to unassign the construction id for and hit the Save button.

### 6.1.5 Assignments Tab

When you click on the Role Assignments tab, the following will open:

Project Information

Responsible DOT Office:  Project ID:  Project Name:  Project Highway:  Project Type:

Remove Import from FIIPS  
Export + Back

Project Details
Plat Summary
Relo Plan
Construction IDs
Cost Allocation
Parcels
Role Assignment
Appraisal Assignment
Appraisal Comps
Relo Comps
+ Add New

Role	Name	Email	Phone	Applied To	Parcels	New Parcels	Delete
RE Supervisor	Craig Andersen	Craig.Andersen@dot.wi.gov	(262) 521-5341	All Parcels		Yes	✕
Statewide Financial Specialist	Shirley Bradley	Shirley.Bradley@dot.wi.gov	(608) 266-2366	All Parcels		Yes	✕
Statewide Financial Specialist	Rebecca A Sorensen	rebecca.sorensen@dot.wi.gov	(608) 267-3856	All Parcels		Yes	✕
Program Associate	Lisa Gourdoux (Southern Wisconsin Appraisal)	lisa@gabock.com	(262) 886-2450	All Parcels		Yes	✕
Statewide LPA Coordinator	Kerry Paruleski	Kerry.Paruleski@dot.wi.gov	(262) 548-6448	All Parcels		Yes	✕
Statewide Acquisition Manager	Norman H Pawelczyk	Norman.Pawelczyk@dot.wi.g...	(920) 492-7708	All Parcels		Yes	✕
Statewide Surplus Land Officer	Mark Krause	mark.krause@dot.wi.gov	(920) 360-3791	All Parcels		Yes	✕

Page 1 of 2
1 - 10 of 14 items

The list will show all of the assignments for the project except Appraisal assignments. If any assignments were made at a level higher than the project in Acquisition Team, they will also be displayed here. All statewide roles will be assigned from the Acquisition Team in Setup. To set up a new assignment click the add new button and the following will open:





First choose the Role that you would like to assign an individual to. Next choose whether the individual is an internal staff person or an external consultant. This will populate the dropdown appropriately. Choose the desired individual from the dropdown. If the desired person does not appear in the list, you will have to go to Staff Maintenance for an Internal Staff person or Vendor Maintenance for an External Consultant. Last you must choose whether the individual will be assigned to existing parcels in the project, new parcels that get added to the project after this assignment is setup or both. Once you have made all of your choices, click the save button, or if you do not wish to save the assignment, click the cancel button. You can repeat these steps for as many assignments as you need to setup.

Please note Appraiser assignment cannot be done from this screen. You need to go to Appraisal Assignment tab to make appraiser assignments.

If you wish to delete an assignment, click the delete button in the row of the assignment that you wish to delete.

### 6.1.6 Appraisal Assignment

When you click on the Appraisal Assignment tab, the following will open:



The screenshot shows the 'Project Information' section with fields for Responsible DOT Office (Waukesha), Project ID (2788-00-20), Project Name (WAUKESHA BYPASS), Project Highway (USH - 018), and Project Type (State). Below this is a navigation bar with tabs for Project Details, Plat Summary, Relo Plan, Construction IDs, Cost Allocation, Parcels, Role Assignment, Appraisal Assignment (selected), Appraisal Comps, and Relo Comps. A '+ Assign Appraiser' button is visible. The main area contains a table of appraisal assignments:

Parcel No	Appraiser	Appraisal Format	Assigned Date	Due Date	Date of Report	Edit	Delete
33	Gene Bock (Southern Wisconsin Appraisal)	Standard Before And After	03/04/2017	03/04/2017	03/04/2017		
111	Gene Bock (Southern Wisconsin Appraisal)	Standard Abbreviated	03/14/2017	03/14/2017	03/14/2017		

At the bottom, there is a pagination control showing 'Page 1 of 1' and a total of '1 - 2 of 2 items'.

The list will show all of the appraiser assignments for the project. To set up a new appraisal assignment click the Assign Appraiser button and the following will open:

The 'Assign Appraiser' form includes the following fields and controls:

- Appraiser \***: A dropdown menu with 'Select Appraiser'.
- Appraisal Format \***: A dropdown menu with 'Select Appraisal Type'.
- Assigned Date \***: A date input field with a calendar icon and a close button (x).
- Due Date \***: A date input field with a calendar icon and a close button (x).
- Select Parcels for Assignment \***: A text input field with 'Select Parcels'.
- Save** and **Cancel** buttons.

First choose the Appraiser that you would like to assign as an Appraiser. Enter the Appraisal Format, Assigned Date and the Due Date. Next you should choose one or more parcels to make the assignment. Once you have made all of your choices, click the save button, or if you do not wish to save the assignment, click the cancel button. You can repeat these steps for as many appraisal assignments as you need to set up.

If you wish to delete an assignment, click the delete button in the row of the assignment that you wish to delete.

### 6.1.7 Appraisal Comps Tab

When you click on the Appraisal Comps tab, the following will open:



**Project Information**

Responsible DOT Office: Waukesha | Project ID: 1060-33-26 | Project Name: ZOO INTERCHANGE, USH 45 (N) | Project Highway: USH - 045 | Project Type: State

Buttons: Remove Import from FIIPS, Export, Back

Navigation: Project Details, Plat Summary, Relo Plan, Construction IDs, Cost Allocation, Parcels, Role Assignment, Appraisal Assignment, **Appraisal Comps**, Relo Comps

Link Comparables

County	Property Name	Property Type	Site Area	Confirmed Price	Price/Area	Sale Date	Edit	Delete
--------	---------------	---------------	-----------	-----------------	------------	-----------	------	--------

Page 0 of 0 | No items to display

This screen will show list of comparables that are linked to the project

In order to link existing comparables to this project click on Link Comparables and the following screen will popup:

**Comparables**

Comp Sale #:  | County: --Select County-- | Property Type: --Select Property Type-- | Property Area Min:  | Property Area Max:  | Sale Date From:  x Refresh

Sale Date To:  x | Back

Select	Comp Sale #	Property Type	Municipality	County	Sale Price	Sale Date	Property Size	Property Size Unit	Edit
--------	-------------	---------------	--------------	--------	------------	-----------	---------------	--------------------	------

Page 1 of 1 | No items to display

You can use the filters on the top to search the comparables you want to link.



**Comparables**

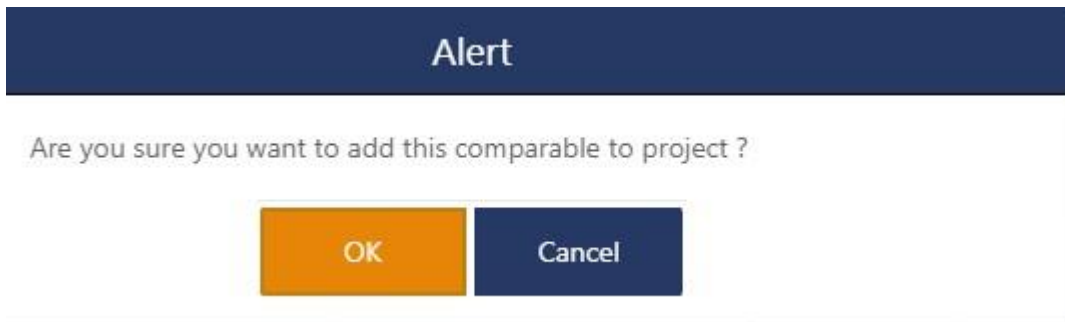
Comp Sale #  County  Property Type  Property Area Min  Property Area Max  Sale Date From

Sale Date To

Select	Comp Sale #	Property Type	Municipality	County	Sale Price	Sale Date	Property Size	Property Size Unit	Edit
<input type="checkbox"/>	C345	Agricultural	Town of Lima	Sheboygan	124,000.00	06/12/2018	26.260	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C346	Agricultural	Town of Wilson	Sheboygan	292,000.00	06/22/2018	40.000	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C347	Agricultural	Town of Sheboygan Falls	Sheboygan	214,700.00	12/22/2017	46.610	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C348	Agricultural	Town of Sheboygan Falls	Sheboygan	220,000.00	11/18/2017	18.230	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C380	Agricultural	Town of Taycheedah	Fond du Lac	2,115,400.00	10/14/2016	264.416	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C383	Agricultural	Town of Taycheedah	Fond du Lac	686,000.00	03/14/2017	81.450	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C395	Agricultural	Town of Taycheedah	Fond du Lac	470,000.00	04/05/2017	60.264	Acres	<input type="button" value="Edit"/>
<input type="checkbox"/>	C396	Agricultural	Taycheedah	Fond du Lac	457,500.00	04/01/2018	77.572	Acres	<input type="button" value="Edit"/>

Page 1 of 9 1 - 10 of 84 items

Click on the Select checkbox in the first column to link that comparable with the project The following message will show up:



Clicking Ok will link that comparable to the project. You can continue to include multiple comparable from the list to link to the existing project.

Clicking Back button will take you back to the Appraisal Comps listing screen for the project.

It will show the selected comparables in the listing screen:



County	Property Name	Property Type	Site Area	Confirmed Price	Price/Area	Sale Date	Edit	Delete
Sheboygan	Lot 1 and Outlot 1 of a Certified Survey Map recor	Agricultural	26,260	124,000.00	4,722.01	06/12/2018		

Page 1 of 1 | 1 - 1 of 1 items

### 6.1.7 Relo Comps Tab

When you click on the Relo Comps tab, the following will open:

**Project Information**

Responsible DOT Office: Waukesha | Project ID: 2788-00-20 | Project Name: WAUKESHA BYPASS | Project Highway: USH - 018 | Project Type: State

Buttons: Remove Import from FIIPS, Export, + Back

Navigation: Project Details, Plat Summary, Relo Plan, Construction IDs, Cost Allocation, Parcels, Role Assignment, Appraisal Assignment, Appraisal Comps, **Relo Comps**

Relocation Type: -- Select Option -- |  Sold Out | Refresh | + Add Business Comparable | + Add Residential Comparable

Type	Comparable #	Business/Unit Type	Business Name	Address/Location	Price/Rent	Edit	Delete
No items to display							

Page 0 of 0

All Business and Residential relocation comparables are entered here for a project. These comparables will be used within the Comparables section in Relocations. You can use the filters on the top portion of the screen to view Residential or Business Comparables. You can also check the Sold Out Properties checkbox to view properties that were sold out. If you wish to edit an existing comparable click on the edit button in the desired row of the comparable. If you wish to delete an existing comparable you can click on the delete button. In order to add a Residential comparable click on the Add Residential Comp button and the following screen will open:



Please enter the Comparable # for a residential comparable, select purchase or rent depending on whether the comparable is available for rent or a purchase. Depending on the selection the following fields will show up:

Purchase Option selected:

Rent Option Selected

Once you are done entering the information on the screen, click the save button, or if you do not wish to save the comparable, click the cancel button.

In order to add a Business comparable click on the Add Business Comp button and the following screen will open:



Please enter the Comparable # for a business comparable, select purchase or rent depending on whether the comparable is available for rent or a purchase. Depending on the selection the following fields will show up:

Purchase Option selected:

Rent Option Selected

Once you are done entering the information on the screen, click the save button, or if you do not wish to save the comparable, click the cancel button.



The Relocation comparable entered in this section will be made available to all the Relocation records for all the parcels depending on the type of relocation – residential or business

### 6.1.8 Payment Tab

When you click the Payment tab, the following will open:

**Project Information**

Responsible DOT Office: Waukesha | Project ID: 2788-00-20 | Project Name: WAUKESHA BYPASS | Project Highway: USH - 018 | Project Type: State

Remove Import from FIIPS | Export | Back

---

Primary | Relo Plan | Construction IDs | Cost Allocation | Parcels | Role Assignment | Appraisal Assignment | Appraisal Comps | Relo Comps | **Payment** | De

Payee: | Acct Code: --Select Acct Code-- | Payment Type: --Select Payment Type-- | Refresh | Create Project Payment Request

Date Created	Payment Type	Account Code	Payee	Status	Check Handling	Chk Cut	Check/ACH#	Amount	Edit	Delete
09/24/2018	Local Public Agency - County	8700153	Waukesha County	Check Issued	Region Office / Consultant	09/27/2018	1001148238	748,513.75		
10/17/2018	Local Public Agency - County	8700153	Waukesha County and Administr. Center Rm AC 220	Check Issued	Region Office / Consultant	10/30/2018	1001185730	112,520.00		
10/22/2018	Local Public Agency - County	8700153	Waukesha County	Check Issued	Region Office / Consultant	10/30/2018	1001185749	40,678.20		
01/10/2019	Local Public Agency - County	8700153	Waukesha County	Check Issued	Region Office / Consultant	01/15/2019	1001259475	58,321.00		

Page 1 of 6 | 1 - 10 of 59 items

This section is used to create Payment Requests for Project level costs only like Incidental expenses. When you click on Create Payment Request and the following dialog will open:

Primary | Relo Plan | Construction IDs | Cost Allocation | Parcels | Role Assignment | Appraisal Assignment | Appraisal Comps | Relo Comps | **Payment** | De

Save | Cancel

Date Created: 04/07/2024 | Account Code: | Invoice ID: | Check Amount: 0.00 | Date Submitted to CO: | Submitted By: |

Payment Type: --Select Payment Type-- |  Rush Payment | Address: | Payment Status: |

Payee 1: | Address Line 2: | Check/ACH#: | Check Cut Date: |

Payee 2: | City: | State: WI | Zip: |

Check Handling: --Select Check Handling-- | Payment Message: |

Comments: |

**STAR / PeopleSoft**

Prime Org / Dept. ID: 1022321000 | Category / Act. Desc: 0010NULL

Fund: 21100 | Apprtn: 96100

PO #: |

The details on this screen are explained in [Section 7.17](#).

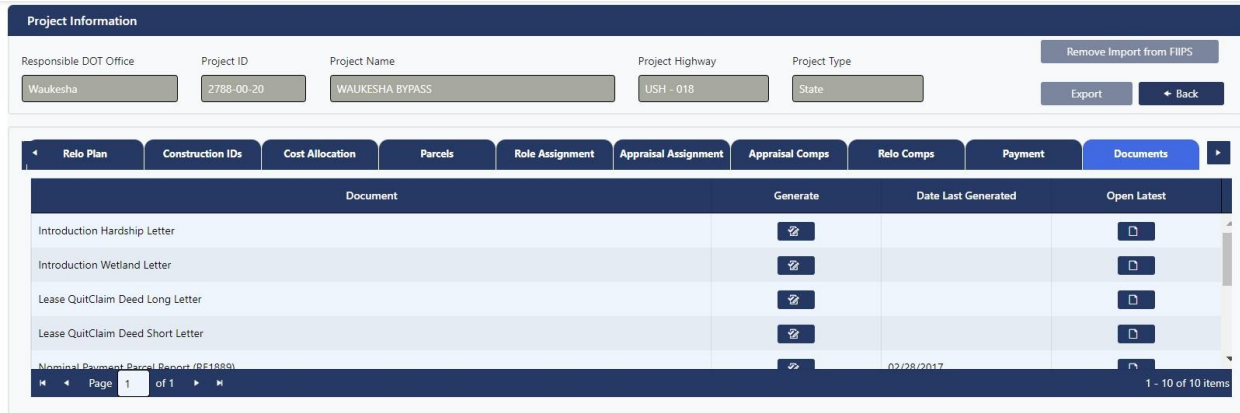




Once you are done entering data, click the save button, if you do wish to save the changes, click the cancel button.

### 6.1.9 Documents Tab

The documents screen allows you to open and generate documents associated with project. When you click on the tab, the following screen will open:



You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the Project Log. The next time you open the Documents tab, the table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.

### 6.1.10 Log Tab

This log will contain project level data. You can attach important documents here, as well as email the documents or just send an email from the log. Instructions for the Log are included in Section 5 of this manual. All the documents generated at the Project level like the Project Cost Allocation, Introduction Letter, Nominal Payment Parcel Report and Real Estate Encumbrance will get inserted into the log for record keeping purposes.

## 7.0 PARCEL CENTRAL

Parcel is the primary interface in READS where users can enter and manage all the information about each parcel. You can open Parcel Acquisition details by clicking “Parcel Central on the Left Menu click on any of the menus within the Parcel Central and the following screen will open:



From this screen you can select a particular parcel by using the dropdown boxes appearing at the top of the form. These dropdown boxes work in a cascading manner, for example, when you select a particular Responsible DOT Office, the Project ID will be limited to only those Projects acquired for the region office you selected. Once you have chosen a Project ID you will see all parcels in the Parcel dropdown that belong to the Project ID you selected. You can then choose the desired parcel from the Parcel dropdown. By default this screen will always have the Region Office selected where the logged in user is associated with.

Once you select a parcel the Parcel Menu will be filled in with various choices and the Parcel Information menu item will open by default for the selected parcel

By selecting a menu item, the center frame will load the program module corresponding to the selection you made. The following sections will describe each module appearing on the Parcel Menu.

### 7.1 Parcel Information

Once you select a parcel the Parcel Menu will be filled in with various modules for which you have security access, and the Parcel Information menu item will open by default for the selected parcel. The first module is Parcel Information, which includes general parcel information that will auto-populate into additional modules throughout READS.



The Parcel Information form includes the basic information about a parcel as shown below.



If the information has already been entered and you need to change something, click the edit button at the top of the screen. You will need to choose the Zoning and Present Use from the dropdown list. If the Zoning and Present Use is not listed in the dropdown, you should raise a Service Request from the Ehelps.

The table in the right-bottom-portion of the screen lists the taxing units and tax key nos for a parcel.

You should use the Add New option only if there are multiple Tax Key Nos for a parcel. You can add Taxing Units and Tax Key Nos by clicking the Add New button. The following screen will open allowing users to add a new taxing unit and tax key no as the first entry in the table:

Please enter the Tax Key No and the Taxing Unit and then hit the  button to confirm or the  button to cancel.



You can continue to complete the remaining requested information in the Parcel Information screen and then click the save button. If you do not wish to save the changes, click the cancel button.

The screen also shows the Title Information, the Legal Name entered on this screen shows up on all the Conveyance documents generated within the Offers/Negotiations section.

**Title**

Title Company:

Title Policy #:

Legal Name:

In addition to this there are read only fields that are entered on other screens. For example, the Construction Ids is assigned for multiple parcels within Project Details – Parcel tab.

## 7.2 Acquisition Team

The Assignments established for a project identifies the acquisition team members and their associated role. From the Parcel Central Menu, click on the Acquisition tab. The Acquisition Team form shown below includes a table of the key members involved in the acquisition process.

Project

Parcel Central

- Parcel Information
- Acquisition Team
- Participants
- Interests
- Waiver of Appraisal
- Appraisal
- Owner Appraisal
- Offer/Negotiations
- Negotiation Diary
- Relocation
- Buildings/Structures
- Litigation

Responsible DOT Office:  Project ID:  Parcel No:  Parcel Name:

Prev Next

**Acquisition Team** + Add New

Role	Name	Phone	Email	Delete
Acquisition Specialist	Scott Dellenbach (TerraVenture Advisors, LLC (Elm Grove))	(414) 327-2607	scott@tva-llc.com	✕
Appraiser	Gary Thompson (National Appraisal Corporation)	(414) 383-2122	gary@national-appraisal.com	✕
PDS Project Leader	Doug Cain	(262) 548-5603	douglas.cain@dot.wi.gov	✕
RE Supervisor	Craig Andersen	(262) 521-5341	Craig.Andersen@dot.wi.gov	✕
Review Appraiser, Region	Richard Dickson	(715) 836-3870	Richard.Dickson@dot.wi.gov	✕

1 - 5 of 5 items

You can view all the Parcel assignments.

When viewing the Acquisition Team, certain Team Members may already be added based on information entered in the Acquisition Team screen outside of the Parcel Central Menu, as



discussed in Section 7.2 or the Role Assignments tab in the Project screen as discussed in Section 6.2.5. By pre-configuring the overall program as discussed in Section 8.5 and Sections 6.2.5, it is possible to save time by automatically designating certain roles and responsibilities to new parcels.

To add a new assignment, click the Add New button and the following will open:

Add/Edit Acquisition Team

Save Cancel

Select Role \*

--Select Role--

Select Type

Internal Staff of this Role Type

External Consultant of this Role Type

All Internal Staff

Select Internal Staff/External Consultant \*

--Select Internal Staff/External Consultant--

First choose a role from the Select a Role dropdown list. Next choose whether the person being assigned is Internal Staff of this Role Type, External Consultant of this Role Type, All Internal Staff, If the person is a staff member, choose Internal Staff of this Role Type or All Internal Staff. If the person is an external consultant or vendor, choose External Consultant of this Role Type. The dropdown below this choice will be filtered based on the Roles that were assigned to a person in Staff Maintenance for Internal Staff (Section 8.3) or the Services assigned to a person in Vendor Maintenance for the External Consultants (Section 8.4). Once you have chosen the Role and the Person, click the save button. If you do not wish to save your choices, click the cancel button.




To delete an existing assignment, click the delete button next to the name of the person you would like to delete. This person will now be deleted only for this assignment for the property in which you are working. It will not be deleted from anywhere else in the system.



### 7.3 Participants

This module is where information for the owner(s) and/or tenants that may be occupying the property, mortgagee, lien/judgment, delinquent taxes, plaintiff attorney, contact persons, trustee, Sign Owner, etc. When you click on the Participants menu item under Parcel Central menu you will see the following screen:

Participant Name ↑	Type	Relocation	Edit	Delete
Richard L. Gabert	Owner	No		
Terry J Gerbers	Plaintff Attorney	No		
Thomas N Rusch	Owner	No		

This list will show all the participants entered for this parcel. In order to view details about the Participant already entered for the parcel you can click on the Edit button  in the table, if you wish to delete a participant, click the delete button  in the line of the corresponding participant name. To add a new participant click the add new button  and the following form will be displayed:



The screenshot shows the 'Participants' form with the following sections:

- Header:** 'Participants' title, 'Save' and 'Cancel' buttons.
- Form Fields:**
  - Type: Select Type (dropdown)
  - Check this box if Legal Entity (checkbox)
  - 1099 Confirmed (checkbox)
  - Participant Name: First Name, Middle Initial, Last Name (text boxes)
  - Spouse Name: First Name, Middle Initial, Last Name (text boxes)
  - Relocation: No (dropdown)
  - Resides on Parcel: Select Option (dropdown)
  - Comments: Large text area
  - Mailing Address International (checkbox)
  - Mailing Address: Three-line text area
  - City, State (WI dropdown), Zip (text box)
  - Phone, Ext., Fax (text boxes)
  - Cell No., Home Phone, E-mail (text boxes)
  - Select if Physical Address is same as Mailing Address (checkbox)
  - Physical Address International (checkbox)
  - Physical Address: Two-line text area

Please select whether the participant to be entered is an individual or a Legal entity, if an individual is selected the screen will show a Full name and a Spouse name field to be entered, if legal entity option is selected to enter a Business, Corporation etc then a Business name field will show up and a checkbox shows up to identify whether the Business is a corporation or not.

If property address was not entered on the parcel information screen and if you entered the mailing address of the participant and the property address is the same as the mailing address

then check the box  Select if Physical Address is same as Mailing Address which copies the mailing address fields into the property address as shown below:

If the participant’s mailing address is international then you can check the Address International checkbox and the third line of the address changes to allow you to enter a city, state, country and zip code as shown below:

Please enter as much information as you can for a participant to make it available in further steps of acquisition or on the documents that get generated as part of the acquisition process

A relocation record will be created from the participants screen by selecting Yes in the Relocation dropdown. Once Relocation is set to Yes 2 additional data fields will show up allowing you to enter the Relocation Unit # and the relocation category as below:

The screenshot shows the following form fields:

- Relocation: Yes (dropdown)
- Resides on Parcel: Select Option (dropdown)
- Relo. Unit #: (text box)
- Relo. Category: -- Select Option -- (dropdown)



Once you are done entering the information click the Save button to save the changes, if you do wish to save the changes at this time click the Cancel button.





## 7.4 Interests

When you click on the Interests menu items within the Parcel menu the following screen will open:

To edit or view the details of an acquisition that has already been entered, click the edit/view button in the row of the corresponding record. Or to delete a record, click the delete button in the row of the corresponding record you would like to delete.

The first field is to specify whether you have access rights, by choosing Yes or No from the dropdown. You can also enter the Total Size and the Existing ROW in either acres or square feet (sq. ft.). The system will calculate the square feet if you enter the acres or vice versa.

When you first come to this screen there will only be one blank line to enter the interests. You will have to choose the type of interest from the dropdown. You can then enter the size of the interest in either acres or square feet. The unit will default to acres. If you have entered the size in square feet, you will have to choose sq. ft. Once you are done entering the data, you can click the save button. If you do not wish to save the data, click the cancel button.



If you have more than one interest, you can click the add new interest button whether or not you are in edit mode and the table will allow you to enter the Interest Type information:



Type of Interest	Size	Unit	Edit	Delete
--Select Type of Interest--		acres	✓ ✕	✕
Fee	0.924	acres	✎	✕

Page 1 of 1 1 - 2 of 2 items

Choose the type of interest. Enter the size and choose either acres or sq. ft. for the unit. Once you have entered the required fields, click the save button. If you do not wish to save the new interest, click the cancel button. You can add as many new interests as needed. For each Fee interest that you add, it will add to the Fee Size in the fields above the table. The Total ROW is then calculated by adding the Fee Size and the Existing ROW.

If you click the notify appraiser button, an email will be sent to the assigned appraiser to notify them if there are plat changes for the parcel.

### 7.5 Waiver of Appraisal

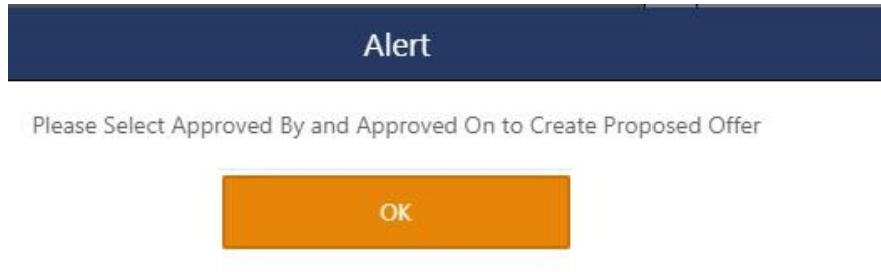
Depending on the value of the parcel being acquired, you may decide to perform a Waiver of Appraisal instead of a full Appraisal. When the Waiver of Appraisal menu item is selected the following screen will open:

The right portion of the screen shows the Approval details which will allow you create an initial Waiver of Appraisal offer. Please check the Check Proposed Offer checkbox in order to create





an initial offer, also make sure to enter Approved By and Approved On fields when the Create Proposed Offer is checked else the following pop up will show up:



The Approved Amount field is calculated from the Allocation tab described in Section 7.5.1  
Once you check the Create Proposed Offer checkbox and hit the Save button the following pop will shows up:



Click Ok and a Waiver of Appraisal offer record will be created on the Offers/Negotiations screen. Once an offer is created the system will lock the Waiver of Appraisal record including all the tabs within this screen. If you do not wish to make an initial Waiver of Appraisal offer you can click the Cancel button on the pop up.

If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

### 7.5.1 Allocation Tab

This tab open up by default on the Waiver of Appraisal screen and the following screen will show up:



In order to populate the allocation table with the information from the Interests screen please click on Update Interest Info button. Clicking on this button will show the following popup:

The detail items including the size will be initially populated from the Interests screen. All the Fee/Non Fee interests added on the Interests screen will show up on the Allocation screen.

You are required to enter a per unit value, the total value or change the unit type for each type of allocation entered on this screen.

You can add a new Allocation by clicking on the Add New button and the following will show up:



Please enter a type of allocation, depending on the type of allocation you select additional fields will show up as below:

You can also add other interest types entered on the Interest screen and the following fields show up allowing users to enter a size and a per unit value:



Add/Edit Allocation ✕

Save Cancel

Allocation * <input type="text" value="Conservation Easement"/>	Size * <input type="text" value="0.000"/>
Unit * <input type="text" value="--Select Unit--"/>	Value Per Unit \$ * <input type="text" value="0.00"/>
Value \$ * <input type="text"/>	Description <input type="text"/>

Once you are done entering the required information for an allocation hit the save button. If you do not wish to save the changes, click the cancel button.

Once you are done entering allocations within the Allocation tab you will see a screen as below:

Allocation	Description	Size	Unit	Value Per Unit \$	Value \$
Temporary Limited Easement (TLE)	0.020 ac x \$5,200/ac x 0.085 x 5.713	0.020	acres	2,550.00	51.00
Appraiser Rounding					199.00
Total : 250.00					

Page 1 of 1  
1 - 2 of 2 items

Please click on the delete button to delete any allocations entered on this screen.

### 7.5.2 Comparables Tab

When you click on the Comparables tab, the following will open:



The table will include all Comparables that were associated with this project in the Project – Appraisal Comps tab. You can filter the list of comparables associated by using the filters on the top portion of this tab area. You can filter the comparables by Property Type, property size range and sale date range. Once you are done entering the filter values hit the refresh button to show then list of comparables that matches the criteria you entered.

To choose the comparables you would like to use for the Waiver of Appraisal process for the parcel, click the “Choose” checkbox in the row of each comparable property you would like to use to include these properties in the report for this parcel. You can choose as many as necessary.

### 7.5.3 Log Tab

To access the Waiver of Appraisal Log for a parcel, click on the Log tab. The following screen on the bottom portion of the page will open:



**Waiver of Appraisal**

Current Status:  Property Owner(s):  Approved Date:   Create Proposed Offer

Parcel Type:  Zoning:  Approved Amount:  Approved By:

**Allocation** **Comparables** **Log**

Date	Type	Subject	View	Edit	E-Auth	Delete	Admin Delete
------	------	---------	------	------	--------	--------	--------------

Page 0 of 0 No items to display

Instructions on editing and adding to the Log are included in Section 5.0.





## 7.6 Appraisal

To access DOT Appraisals, click on the Appraisal menu item and the following will open:

Appraiser	Company	Appraisal Format	Reviewer	Date of Report	Appraised Amount	Review Status	Edit	Delete
Aari Roberts	AJ Appraisals & Real Estate, LLC	Standard Before And After	James L Spice	10/11/2013	158,000.00	Accepted and Recommended		

This list will include all of the appraisals that have been performed for this parcel. When an Appraiser assignment is made for a parcel an appraisal record gets automatically created in the system.

The Appraisal Details screen will also show up when you click the edit button in the row of the appraisal you need to access. If you need to delete an appraisal, click the delete button in the row of the appraisal you wish to delete. After you have chosen an appraisal from the table, the following will open:

Appraisal Details Form Fields:

- Appraiser: Alyssa Absteen
- Appraisal Format: Short Format
- Property Owner(s): Brian E Walker
- Company: WISDOT
- Appraised Amount: 0.00
- Property Address: 2672 N 112th Street, Wauwatosa, WI, 53226-1212
- Appraiser Assigned: 04/02/2024
- Appraisal Due: 05/10/2024
- Ready for Review:  Ready for Review
- Date of Report:
- Hardcopy to Region:
- Plat Approval Date:
- Latest Plat Revision:



The top portion of the screen shows multiple read only fields along with the Appraiser name The Appraisal Format field shows up from the Parcel Information screen and can be modified on this screen depending on the choice of the format the appraiser used.

If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

### 7.6.1 Status Tab

This tab open up by default on the DOT Appraisal screen and the following screen will show up

The Appraiser assigned and appraiser due dates are populated from Projects – Appraisal Assignments tab for this parcel.

Once the appraisal report is ready for review the appraiser can submit the appraisal for review by clicking on the Ready for Review button

Clicking on this button will show an email button which will address the email to the Review assigned

Once the appraisal is submitted for review the Ready for Review date will automatically be populated with the current date.

If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

### 7.6.1 Allocation Tab

This tab open up by default on the DOT Appraisal screen and the following screen will show up:



To populate the allocation table with the information from the Interests screen please click on Update Interest Info button. Clicking on this button will show the following popup:

The detail items including the size will be initially populated from the Interests screen. All the Fee/Non Fee interests added on the Interests screen will show up on the Allocation screen.

You are required to enter a per unit value, the total value or change the unit type for each type of allocation entered on this screen.

You can add a new Allocation by clicking on the Add New button and the following will show up:



Please enter a type of allocation, depending on the type of allocation you select additional fields will show up as below:

You can also add other interest types entered on the Interest screen and the following fields show up allowing users to enter a size and a per unit value:



**Add/Edit Allocation** ✕

**Save** **Cancel**

Allocation \* Size \*

Conservation Easement 0.000

Unit \* Value Per Unit \$ \*

--Select Unit-- 0.00

Value \$ \* Description

Once you are done entering the required information for an allocation hit the save button. If you do not wish to save the changes, click the cancel button.

Once you are done entering allocations within the Allocation tab you will see a screen as below:

**Appraisal** ← Back **Edit**

Appraiser: Alyssia Alsteen | Appraisal Format: Short Format | Property Owner(s): Brian E Walker

Company: WISDOT | Appraised Amount: 0.00 | Property Address: 2672 N 112th Street, Wauwatosa, WI, 53226-1212

**Status** **Obj Review** **Checklist** **Review Details** **Allocation** **Comparables** **Documents** **Diary** **Log**

Before Value  - After Value  =  **Edit**

**+ Update Interest Info** **+ Add New**

Allocation	Description	Size	Unit	Value Per Unit \$	Value \$	Edit	Delete
Fee		0.224	acres	NaN	0.00	<b>Edit</b>	<b>✕</b>

Total : 0.00

Total Allocation is a read only field calculated as the total value of all the allocations entered on the screen. Please click on the delete button to delete any allocations entered on this screen.



### 7.6.4 Comparables Tab

When you click on the Comps tab, the following will open:

Select	Comp Sale #	Property Type	Tax ID	Municipality	County	Sale Price	Sale Date	Property Size	Property Size Unit
<input type="checkbox"/>	C345	Agricultural	59008091972 & 59008091972	Town of Lima	Sheboygan	124,000.00	06/12/2018	26.260	Acres

The table will include all Comparable that were associated with this project in the Project - Appraisal Comps tab. You can filter the list of comparable associated by using the filters on the top portion of this tab area. You can filter the comparable by Property Type, property size range and sale date range. Once you are done entering the filter values hit the refresh button to show then list of comparable that matches the criteria you entered.

To choose the comparable you would like to use for the Appraisal process for the parcel, click the “Choose” checkbox in the row of each comparable property you would like to use to include these properties in the report for this parcel. You can choose as many as necessary.

### 7.6.5 Obj Review Tab

When you click on the Obj Review tab, the following will open:



**Appraisal** ← Back

Appraiser: Alyssia Alsteen | Appraisal Format: Short Format | Property Owner(s): Brian E Walker

Company: WISDOT | Appraised Amount: 0.00 | Property Address: 2672 N 112th Street, Wauwatosa, WI, 53226-1212

**Status** | **Obj Review** | **Checklist** | Review Details | Allocation | Comparables | Documents | Diary | Log

Comments (Shortcomings, concerns, etc to addressed by the Reviewer)

		Appraiser's Review		Negotiator's Review	
		Yes To All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Items 1-14 to be checked					
		Yes	N/A	Yes	No
1	5-year sales history	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	All applicable "compensable items" are identified, adequately addressed, and separately valued in report.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Area and interest to be acquired agree with latest approved right of way plat or pending revision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Certificate of appraiser is included	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Date of opinion coincides with last inspection date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Math calculations are correct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This screen shows list of items to be completed by the Appraiser, depending whether each item is satisfied as part of the appraisal process please check the Yes column, if Not Applicable then check the N/A checkbox. Please check the Yes to All checkbox if you need to mark all items as Yes, uncheck this box if you need to unmark all items as Yes.

If you need to change something, click the edit button at the top of that screen and then click the save button. If you do not wish to save the changes, click the cancel button.

### 7.6.6 Checklist Tab

When you click on the Checklist tab the following will open:

**Appraisal** ← Back

Appraiser: Alyssia Alsteen | Appraisal Format: Short Format | Property Owner(s): Brian E Walker

Company: WISDOT | Appraised Amount: 0.00 | Property Address: 2672 N 112th Street, Wauwatosa, WI, 53226-1212

**Status** | **Obj Review** | **Checklist** | Review Details | Allocation | Comparables | Documents | Diary | Log

Yes To All

**Scope of work and parameters for this review are as follows**

		Yes	No
1	Area and interests to be acquired agrees with latest plat	<input type="checkbox"/>	<input type="checkbox"/>
2	Owner/representative offered joint inspection opportunity	<input type="checkbox"/>	<input type="checkbox"/>
3	Date of opinion same as date of latest inspection	<input type="checkbox"/>	<input type="checkbox"/>
4	Adequate project and neighborhood discussion	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 1 1 - 22 of 22 items



This screen shows a list checklist items to be entered by the Appraisal Reviewer as part of the Appraisal Review process. Depending whether each item is satisfied as part of the appraisal review please check the Yes column, if Not then check the No checkbox. Please check the Yes to All checkbox if you need to mark all items as Yes, uncheck this box if you need to unmark all items as Yes.

### 7.6.7 Review Details Tab

When you click on the Review Details tab the following will open:

There are data fields on this screen which are read only, if a Review appraiser is not assigned for the parcel the Reviewer and the company fields will be blank

The Fair Market Values are read only and entered in the Allocation tab. Revisions Requested and Revisions Received will show up the latest date based on Comments/Diary items added in the Log where SubType is Revisions Requested and Revisions Received respectively. Based on the appraisal review the review appraiser will change the Review Status field on this screen by selecting an option from one of three options:





**Review Status**

--Select Review Status--

--Select Review Status--

Accepted (Not Recommended)

Accepted and Recommended

Rejected

If Review Status is Accepted (Not Recommended) a field will show up allowing you to enter the Reason for not recommending the appraisal

**Status** **Obj Review** **Checklist** **Review Details** **Allocation** **Comparables** **Documents** **Diary** **Log**

Save Cancel

Reviewer: --Select Reviewer-- Company: [Text Field]

Review Status: Accepted (Not Recommended) Obj Review Completed: [Text Field]

Revisions Requested: [Text Field] Revisions Received: [Text Field]

Subject Field Reviewed: --Select Subject Field Reviewed--

Comments: [Text Area] Reason(s): [Text Area]

Fair Market Value - "Before" acquisition (\$): [Text Field] 0.00

Fair Market Value - "After" acquisition (\$): [Text Field] 0.00

Difference: [Text Field] 0.00

If Review Status is Rejected a field will show up allowing you to enter the Reason for Rejecting the appraisal.

**Status** **Obj Review** **Checklist** **Review Details** **Allocation** **Comparables** **Documents** **Diary** **Log**

Save Cancel

Reviewer: --Select Reviewer-- Company: [Text Field]

Review Status: Rejected Obj Review Completed: [Text Field]

Revisions Requested: [Text Field] Revisions Received: [Text Field]

Subject Field Reviewed: --Select Subject Field Reviewed--

Comments: [Text Area] Reason(s) for Non Approval: [Text Area]

Fair Market Value - "Before" acquisition (\$): [Text Field] 0.00

Fair Market Value - "After" acquisition (\$): [Text Field] 0.00

Difference: [Text Field] 0.00

If Review Status is Accepted and Recommended, an Approval Detail section will show up in the right portion of the screen as below:



This will allow you to create an Initial Offering Price record based on the appraisal, the Approved By and Approved On will be filled in automatically by the reviewer name and the current date respectively. Once the appraisals are approved and the reviewer accepted and recommended the appraisal if the Create Proposed Offer checkbox is checked, hit the Save button and the following message pops up:



If you hit OK then an Initial Offering Price record gets created in the Offer/Negotiations section, if you do not wish to create an initial offer then hit the Cancel button

Once an offer is created the Rvw Details screen you can only undo this action by deleting the Offering Price record within Offers/Negotiations screen.

If you need to change something in the Rvw Details screen, click the edit button at the top of that screen and then click the save button. If you do not wish to save the changes, click the cancel button.



### 7.6.8 Documents Tab

The documents screen allows you to open and generate documents associated with an Appraisal and an Appraisal Review record. When you click on the documents tab, the following screen will open:

You can generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Appraisal Log. The next time you open the Documents tab, the table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.


Please refer to Section 5.5 for further details about generation and upload of modified documents within the system.

### 7.6.9 Diary Tab

When you click on the Diary tab, the following screen will open:



To add a Diary item, click the Add Diary Item button and the following screen will open:

Enter the requested fields. When you are done entering the data, click the save button. If you do not want to save, click the cancel button. The Diary is then saved in the Log (Section 7.6.10). To view or edit a Diary in the table, click the edit  button in the applicable row.

### 7.6.10 Log Tab

To access the Appraisal Log for a parcel, click on the Log tab. The following screen on the bottom portion of the page will open:



**Appraisal** ← Back   Edit

Appraiser: Alyssa Alsteen   Appraisal Format: Short Format   Property Owner(s): Brian E Walker

Company: WISDOT   Appraised Amount: 0.00   Property Address: 2672 N 112th Street, Wauwatosa, WI, 53226-1212

Status   Obj Review   Checklist   Review Details   Allocation   Comparables   Documents   Diary   Log

+ Add Call Data   + Add Notes   + Add Attachment   + Send Email

Date	Type	Subject	View	Edit	E-Auth	Delete	Admin Delete
No items to display							

Page 0 of 0

Instructions on editing and adding to the Log are included in Section 5.0.

### 7.7 Owners Appraisal

When you click on the Owners Appraisal menu item within the Appraisals menu the following screen will open:

**Owner Appraisal** Edit

Current Status: Appraisal   Property Owner(s): Brian E Walker   Appraisal Format: --Select Appraisal Format--   Project Data Book: 08/26/2015

Parcel Type: Intermediate Improved   Appraiser:   Company:   Eff. Date of Report:   Owners Appr. Recvd.:   Appraised Value: 0.00

Allocation   Log

+ Update Interest Info   + Add New

Allocation	Description	Size	Unit	Value Per Unit \$	Value \$	Edit	Delete
Total : 0.00							

Page 0 of 0

You need to specify the Owners Appraiser name, the company name and the appraisal format for the owner’s appraisal.

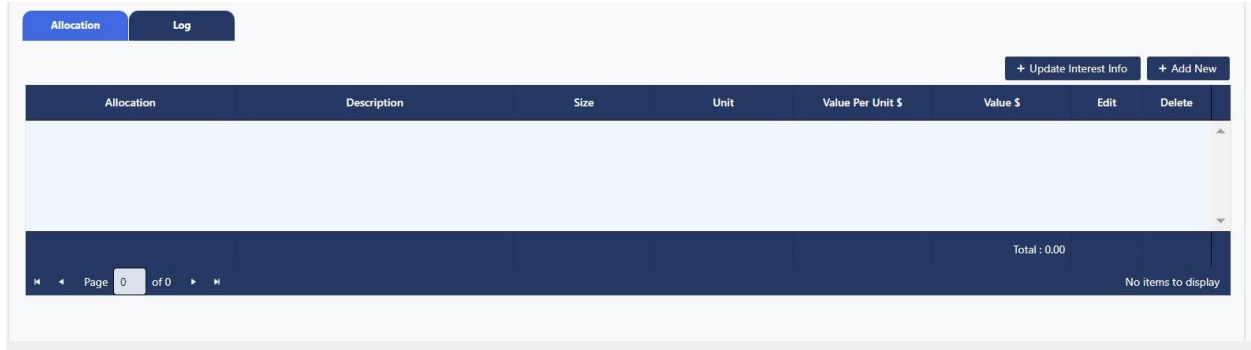
The Appraised Value field is calculated from the Allocation tab described in Section 7.7.1

If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

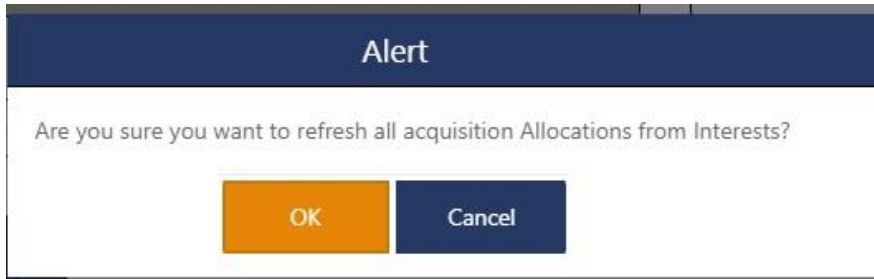


### 7.7.1 Allocation Tab

This tab opens up by default on the Owners Appraisal screen and the following screen will show up:



In order to populate the allocation table with the information from the Interests screen please click on Update Interest Info button. Clicking on this button will show the following popup:



The detail items including the size will be initially populated from the Interests screen. All the Fee/Non Fee interests added on the Interests screen will show up on the Allocation screen.

You are required to enter a per unit value, the total value or change the unit type for each type of allocation entered on this screen.

You can add a new Allocation by clicking on the Add New button and the following will show up:



Please enter a type of allocation, depending on the type of allocation you select additional fields will show up as below:

You can also add other interest types entered on the Interest screen and the following fields show up allowing users to enter a size and a per unit value:



### Add/Edit Allocation ✕

Save Cancel

Allocation *	Size *
<input type="text" value="Conservation Easement"/>	<input type="text" value="0.000"/>
Unit *	Value Per Unit \$ *
<input type="text" value="--Select Unit--"/>	<input type="text" value="0.00"/>
Value \$ *	Description
<input type="text"/>	<input type="text"/>

Once you are done entering the required information for an allocation hit the save button. If you do not wish to save the changes, click the cancel button.

Once you are done entering allocations within the Allocation tab you will see a screen as below:

#### Owner Appraisal Edit

Current Status	Property Owner(s)	Appraisal Format	Project Data Book		
<input type="text" value="Appraisal"/>	<input type="text" value="Brian E Walker"/>	<input type="text" value="--Select Appraisal Format--"/>	<input type="text" value="08/26/2015"/>		
Parcel Type	Appraiser	Company	Eff. Date of Report	Owners Appr. Recvd.	Appraised Value
<input type="text" value="Intermediate Improved"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="2,240.00"/>

Allocation Log

+ Update Interest Info + Add New

Allocation	Description	Size	Unit	Value Per Unit \$	Value \$	Edit	Delete
Fee		0.224	acres	10,000.00	2,240.00		

Total: 2,240.00

Page 1 of 1 1 - 1 of 1 items

Total Allocation is a read only field calculated as the total value of all the allocations entered on the screen. Please click on the delete button to delete any allocations entered on this screen.





### 7.7.2 Log Tab

To access the Owners Appraisal Log for a parcel, click on the Log tab. The following screen on the bottom portion of the page will open:

Instructions on editing and adding to the Log are included in Section 5.0.

### 7.8 Offer/Negotiations

The offer/negotiations module tracks the details associated with the offer and negotiation phase of acquisition. When you click on the Offer/Negotiations menu in the Parcel Central Menu, the following screen will open:

If an initial offer was created from the Waiver of Appraisal screen (Section 7.5) or from the DOT Appraisals screen (Section 7.6) the Negotiation record will automatically show up on the screen



If an initial offer was not created the user will need to add a new negotiation record, click on the Add New button and the following screen will show up:

The screenshot shows the 'Offer/Negotiations' form with the following fields:

- Owner(s) \*: --Select Owner(s)--
- Negotiator \*: --Select Negotiator--
- Offer Date: [Empty]
- Offer Type: [Empty]
- Total Compensation \$: 0
- Offer Amount \$: 0
- Accepted: [Empty]

Buttons: Save, Cancel

Please select the Owner from the dropdown list of participants. Also select the Negotiator. If a Negotiator is not assigned to the Parcel please go to the Acquisition team or Projects – Role Assignments tab to assign a Negotiator for this parcel. The Offer related fields are readonly fields and will be populated with the latest offer given to the property owner.

You can add as many negotiation records. After selecting the Owner and the Negotiator, save the record by clicking on the Save button and the following screen will show up:

The screenshot shows the 'Offer/Negotiations' form after saving. The fields are populated as follows:

- Owner(s) \*: Felton Brazill (Owner)
- Negotiator \*: Mark Ruszkiewicz
- Total Compensation \$: 0.00
- Offer Amount: 0.00
- Accepted: [Empty]

Buttons: Open Legal Description, Back, Edit

Navigation Menu: Details, Offers, Pro Rata Taxes, Mortgage Release, Recording, Documents, Diary, Log

Additional Fields:

- Brochure Sent: 11/07/2013
- Initiation of Neg: [Empty] x  Gave  Sent
- Offer Accepted Date: [Empty] x
- ROE Signed: [Empty] x
- ROE Expires: [Empty] x
- Owner Appraisal Due: [Empty]
- Owners Appr. Recvd: [Empty]
- Appeal End: [Empty]
- Closing Date: [Empty] x
- Comments: [Empty]

Buttons: Edit

### 7.8.1 Negotiations Details

When you click on the Offer/Negotiations menu item on the Parcel menu the Negotiations Details tab opens by default:



**Offer/Negotiations** Open Legal Description [← Back](#) [Edit](#)

Owner(s) \*  Offer Date  Offer Type

Negotiator \*  Total Compensation \$  Offer Amount  Accepted

**Details** **Offers** **Pro Rata Taxes** **Mortgage Release** **Recording** **Documents** **Diary** **Log** [Edit](#)

Brochure Sent  Initiation of Neg   Gave  Sent Owner Appraisal Due

Offer Accepted Date  ROE Signed  ROE Expires  Owners Appr. Recvd

Appeal End  Closing Date  Comments

This screen keeps track of many of the negotiation related fields as part of the acquisition process. Some of the fields are read only and some are calculated fields. The Owner Appraisal due date is calculated as 60 days after the Initiation of Negotiation is given to the property owner or 63 days after the Initiation of Negotiation is sent to the property owner, calculated based on the Initiation of Neg date filled on the screen and whether Gave or Sent option is selected. Please fill in other required date fields on this screen.

If the information has already been entered and you need to change something, click the edit button **Edit** at the top of the tab screen and then click the save button **Save**. If you do not wish to save the changes, click the cancel **Cancel** button.

If you enter the JO Expiration date and the additional days the system calculates the Occupancy Date, hit the Save button to save the information entered for a Jurisdictional offer.

### 7.8.2 Offers

The Offers tab will show list of offers that were created for this parcel.

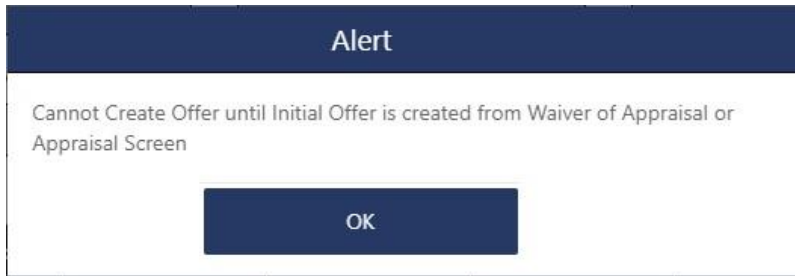
Once an initial offer is created based on Waiver of Appraisal or an Appraisal the offers tab will show the initial offer created.

**Details** **Offers** **Pro Rata Taxes** **Mortgage Release** **Recording** **Documents** **Diary** **Log** [+ Create Offer](#)

Offer Type	Seq. #	Based On Offer	Offer Date	Offer Accepted	Approved By	Offer Amount (\$)	Edit	Delete
Offering Price	1	Appraisal (Dennis M Stefaniak)	03/18/2014	Yes	James L Spice	700,000.00		

Page 1 of 1 1 - 1 of 1 items

If there is no initial offer created and the user clicks on the Create offer button it will show the following message



To view/edit an offer you can click on the Edit button and the following screen will open for that offer type:

Details Offers Pro Rata Taxes Mortgage Release Recording Documents Diary Log

← Back Edit

Offer Type \*  
Offering Price

Approved Date  
03/18/2014

Approved By  
James L Spice

Based On Offer \*  
Appraisal (Dennis M Stefanik)

Accepted Offer  
Yes

Approved Amount  
700,000.00

+ Add New

Allocation	Description	Size	Unit	Value Per Unit \$	Value \$	Edit	Delete
Fee		0.276	acres	1,086,956.52	300,000.00		
Improvements - All inclusive					400,000.00		

Total : 700,000.00

Page 1 of 1

1 - 2 of 2 items

You can make minor modification to the allocation within the Allocation tab. The Allocation tab functionality works the same way as the Allocation tab within Waiver of Appraisal (Section 7.5) or DOT Appraisals (Section 7.6)

If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

You can then click the Back button to go back to the Offers listing screen.

Please click on the delete button to delete any offer entered on this screen. In order to create multiple revisions of an offer or to create additional offers please click on the Create Offer button and the following dialog will open up:

Details Offers Pro Rata Taxes Mortgage Release Recording Documents Diary Log

Save Cancel

Offer Type \*  
-- Select Offer Type --

Approved Date  
[ ]

Approved By  
-- Select Approved By --

Based On Offer \*  
-- Select Based On Offer --

Accepted Offer  
-- Select Accepted Offer --

Approved Amount  
0.00



You need to select an Offer type to be created and can select from one of the offer types:

Offer Type \*

-- Select Offer Type --

-- Select Offer Type --

Admin Revision

Alternate A - Acquisition of Entire Property

Alternate B - Acquisition of Remnant Tracts

Jurisdictional Offer

Offering Price

Waiver of Appraisal

Once an offer type is selected you can create this offer based on an existing offer that was created for the parcel:

Based On Offer \*

--Select Based On Offer--

--Select Based On Offer--

1 - Offering Price

Interests Required

The Based on Existing Offer dropdown will show all the offer types that were created in the system for the parcel. In addition to the existing offers there is also an Interests Required option that can be selected as an option to base the offer on. By selecting this option the new offer will be created based on the Interests entered on the Interests screen (Section 7.4).

All other types of offers like the Alternate A, Alternate B, Jurisdictional Offer and Administrative Revision offers can be created on this screen. You can also create multiple revisions to the same type of offer. Each offer has a sequence number associated with it, as and when you create multiple revisions of the same type of offer the sequence number gets incremented automatically for a parcel.

The system only allows one type of offer to be selected as the final offer meaning there can only be one offer where the Accepted Offer is set to Yes for a parcel.

Click the save button to save the changes, or click the cancel button if you do not wish to save the changes.



### 7.8.3 Pro Rata Taxes Tab

This screen allows you calculate the tax reimbursements due to the property owner, will also allow you to generate the disposition of real estate taxes for Partial and Total Acquisition.

When you click on the tab, you can choose Total Acquisition or Partial Acquisition as shown below:



#### 7.8.3.1 Total Acquisition

If you select to calculate taxes for a Total Acquisition click on the Total Acquisition tab the following screen will open, this tab opens up by default when you click on Prorata Taxes tab:

Please enter appropriate values on this screen and the Owner's Shares of Taxes will get calculated

Once the Owner's share of taxes are calculated on this screen, click the save button to save the changes, or click the cancel button if you do not wish to save the changes.

Once the tax calculations are done you can generate the disposition of real estate taxes document by clicking on the Generate Disposition of Real Estate Taxes button. The generated document will automatically get inserted into the Log (Section 7.8.5).

#### 7.8.3.2 Partial Acquisition

If you select to calculate taxes for Partial Acquisition click on the Partial Acquisition tab the following screen will open:



Details	Offers	Pro Rata Taxes	Mortgage Release	Recording	Documents	Diary	Log	
Total Acquisition		Partial Acquisition						+ Add New
Tax Key Nos.	Taxing Units	State Share	Owners Share	Mill Rate \$	Generate Disposition of Real Estate Taxes	Edit	Delete	
No items to display								

You can start calculating the taxes for all Tax Key Nos or by each tax key parcel no. The table on this shows all the tax calculations by each tax key no. You can click on the Edit button to edit an existing tax calculation or click on the delete button to delete an existing tax calculation. You can also click on the generate button for each row in the table to generate the disposition of real estate taxes document for the taxes calculated by tax key nos.

To calculate taxes for one or more tax key nos click on the Add New button and the following screen will open:

Details	Offers	Pro Rata Taxes	Mortgage Release	Recording	Documents	Diary	Log	
Total Acquisition		Partial Acquisition						Save Cancel
Preceding/Current year's tax on total parcel	Assessed Valuation - Land	Assessed Valuation - Improvements	Total Assessed Valuation					
0.00	0.00	0.00	0.00					
Mill (Tax) rate \$	Date of Conveyance	Days in Year	Days remaining from Date of Conveyance to end of year					
0.00000		366	0.00					
Taxes Attributed to Land	Tax Key Nos.							
0.00	--Select Tax Key Nos.--							
Taxes on Land Acquired				Taxes on Buildings Acquired				
Area of Acq (acres)	0.000	Value of Bldg. Acquired	0.00	Value of All Bldg.	0.00			
Area of Total Prop (acres)	0.000	% of Bldg. Value Acquired	0.00	Taxes Attributed to Buildings	0.00			
% of Land Acquired	0.00	Building Taxes to be Prorated	0.00	Total Taxes to be Prorated	0.00			
Land Taxes to be Prorated	0.00	State's Share of Taxes	0.00	Owner's Share of Taxes	0.00			

Please enter appropriate values on the screen, use the scroll bar to scroll down to select the tax key nos that you are calculating the taxes for:



Tax Key Nos.

Once the calculations are entered on the screen click the save button to save the changes, or click the cancel button if you do not wish to save the changes.

### 7.8.4 Mortgage Release Tab

When you click on the Mortgage Release tab, the following screen will open:

The user can click on Add New to add a new Mortgagee record and the following screen will show up:

You can click on the Edit button to view the mortgage information that was already entered on this screen. To generate a Partial Release of Mortgage document click on the generate button in the Generate Partial Release of Mortgage column. This will open up a dialog as below allowing you to generate the release document as well as the letter that goes with the document





Document

Return Address: Waukesha

Address To:

Letter Date: 04/08/2024

Certified Mail:

LetterHead: Waukesha

Generate Document

Once the document is generated you can click on the Open button to open the last generated partial release document. Similar to this you can also generate the Satisfaction of Release document by clicking on the generate button in the respective column:

Document

Return Address: Waukesha

Address To:

Letter Date: 04/08/2024

Certified Mail:

LetterHead: Waukesha

Generate Document



Once generated you can click on the Open button to open the last generate satisfaction of release document.

For each mortgage information shown in the table you can click on the Edit button in the table and the following will open:

To edit this screen, click the edit button. Click the save button to save or click the cancel button if you do not wish to save. You can modify all the information on this screen.

Click the back button to go back to the list of mortgages on the property

### 7.8.5 Recording Tab

When you click on the Recording tab, the following screen will open:

You can click on the Edit button to view the recording information that was already entered on this screen.

The user can click on Add New to add a new recording record allowing users to add list of conveyance types for recording purposes, the following screen will show up:



Please enter the instrument type, recording date and other relevant information. Once you are finished with your entry, click the save button. If you do not wish to save the changes you can click on the Cancel button to go back to the list of additional parcel costs.

### 7.8.6 Documents Tab

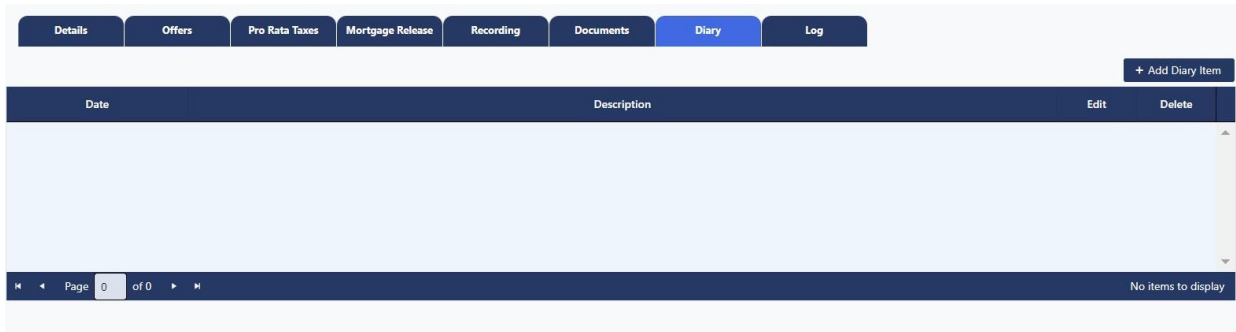
The documents screen allows you to open and generate documents associated with offers/negotiation. When you click on the tab, the following screen will open:

Document	Generate	Date Last Generated	Open Latest
Administrative Revision (RE1592)	[Generate]		[Open Latest]
Administrative Revision Letter	[Generate]		[Open Latest]
Agreement for Purchase and Sale of Real Estate - Long Form (RE1618)	[Generate]		[Open Latest]
Agreement for Purchase and Sale of Real Estate - Short Form (RE1895)	[Generate]		[Open Latest]
Alternative Offer To Purchase (RE1675)	[Generate]		[Open Latest]

You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Negotiations Log (Section 7.11.9). The next time you open the Documents tab, the table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.

### 7.8.7 Diary Tab

When you click on the tab, the following screen will open:



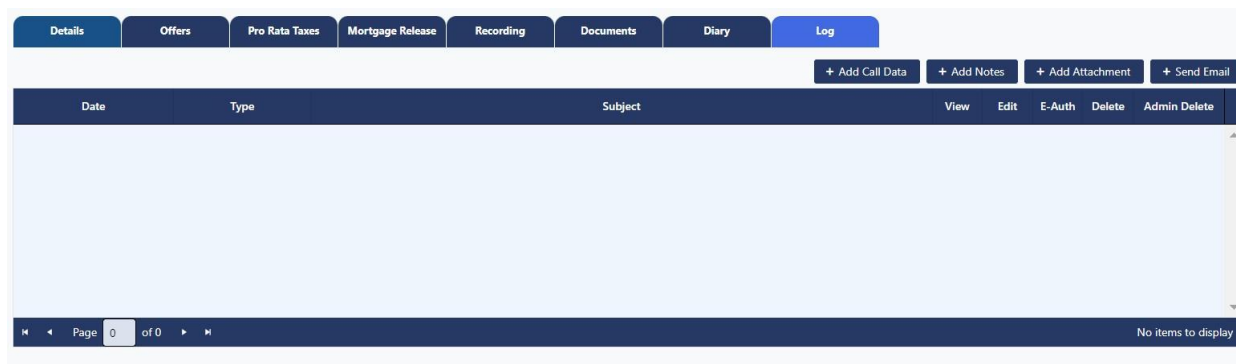
To add a Diary item, click the Add Diary Item button and the following screen will open:



Enter the requested fields. When you are done entering the data, click the save button. If you so not want to save, click the cancel button. The Diary is then saved in the Log (Section 7.11.9). To view or edit a Diary in the table, click the edit button in the applicable row.

### 7.8.8 Log Tab

When you click on the Log tab, the following screen will open:

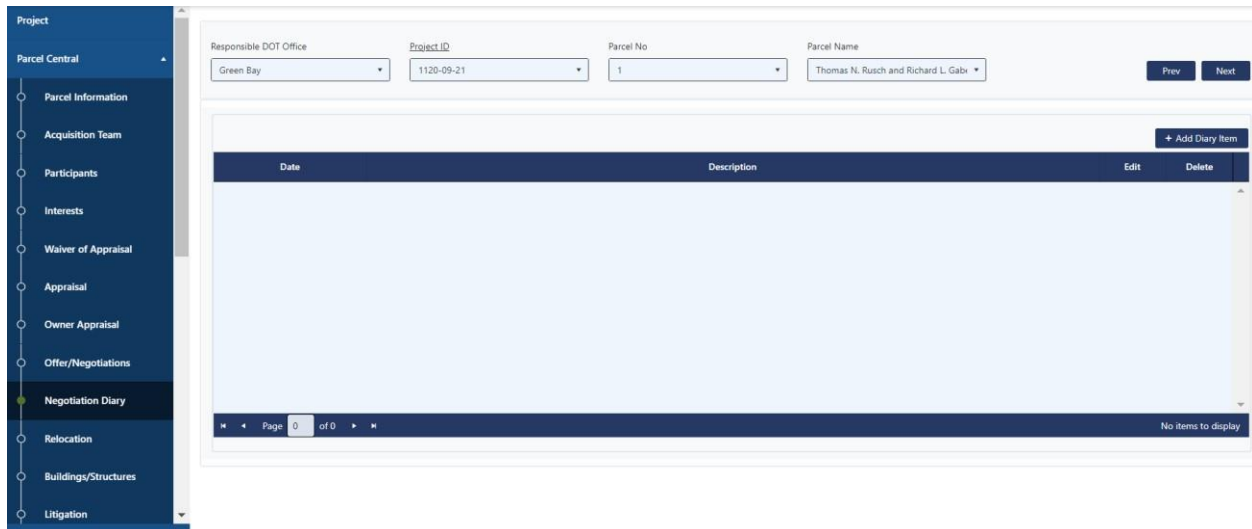


Details of the log are described in Section 5 of this manual. However, one very important aspect of the log for the negotiations process is entering Negotiation Diary Items by clicking the button. The Diary is a description of all contact with the property owner or their representative during the negotiation process. Each contact should be entered into the log as a separate entry.

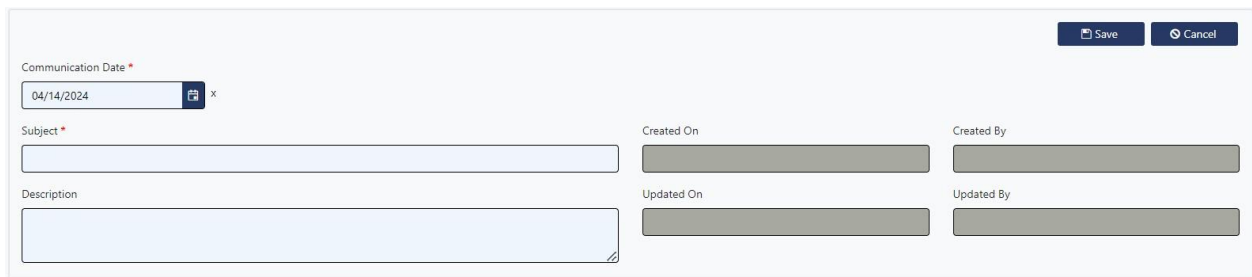


## 7.9 Negotiation Diary

This module allows you to keep track of Negotiation diary items for a parcel. You can access this screen by clicking on Negotiation Diary menu item within the Parcel menu and a new window will open up:



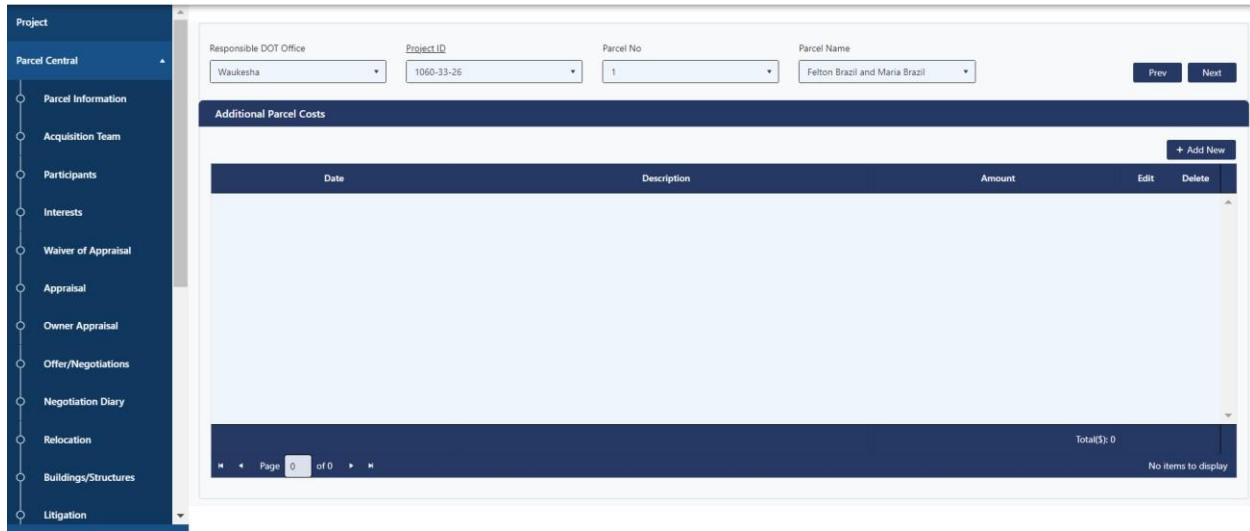
You can access this menu item independently and will always open a new window allowing you to enter negotiation diary items no matter which screen you are currently on. To add a Diary item, click the button and the following screen will open:



Enter the requested fields. When you are done entering the data, click the save button. If you do not want to save, click the cancel button. The Diary is then saved in the Log (Section 7.11.9). To view or edit a Diary in the table, click the edit button in the applicable row.

## 7.10 Additional Parcel Costs

This module keeps track of any additional parcel costs incurred for a parcel. When you click on the Additional Parcel Costs menu item within the Parcel menu the following open:



This will show list of additional parcel costs added for the parcel. You click on the edit button to view the details of an existing parcel cost added, click on the delete button to delete an additional parcel cost already added. When you click on Add New to add a new parcel cost the following will open:

#### Additional Parcel Cost Details

Date \*      Amount \*

0.00

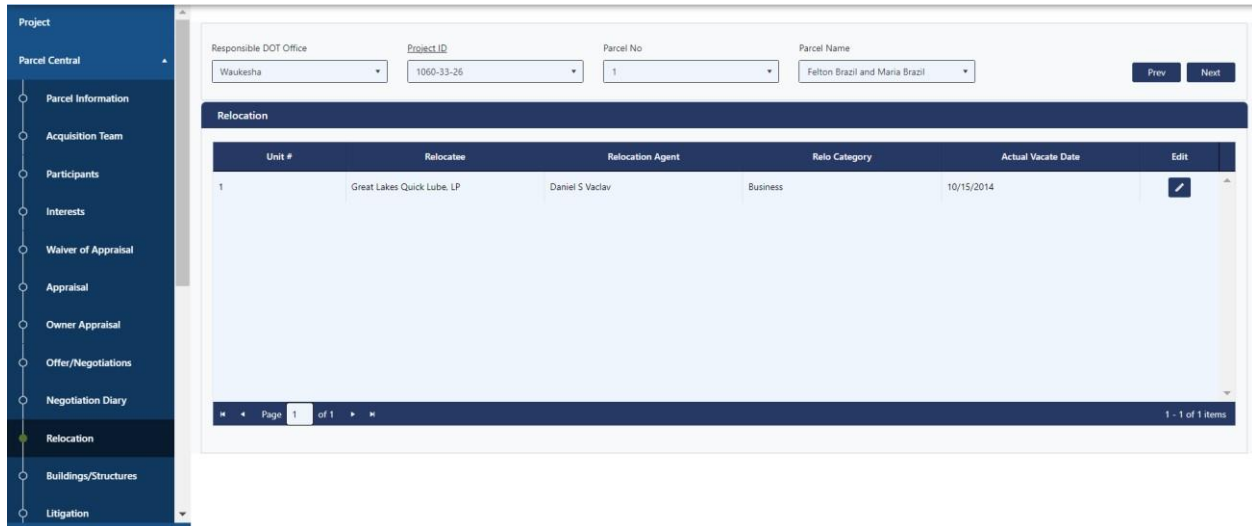
Description

Save      Cancel

Please enter the date, description of the parcel cost and amount of parcel cost. Once you are finished with your entry, click the save button. If you do not wish to save the changes you can click on the Cancel button to go back to the list of additional parcel costs.

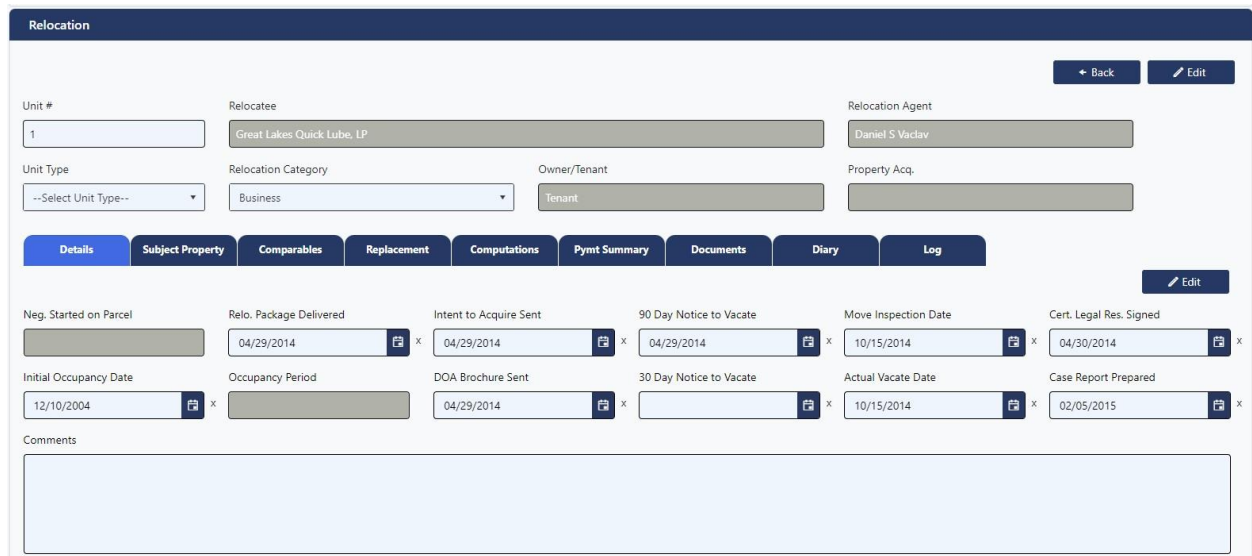
### 7.11 Relocation

The “Relocations” module allows users to keep track of the relocation of property owners and tenants. The Relocations module can be accessed from the Parcel Central Menu by clicking on the Relocations menu item and the following will open.



This list will include all of the owners and tenants that were entered on the Participants screen (Section 7.3) and where “Yes” was chosen for Relocation.

To view the details for a relocatee, click the edit button in the row of the desired relocatee.



To make changes to the information on the top of the screen for all relocatee types, click the edit button at the top of the screen. When you have finished making changes, you can click the save button or if you do not wish to save any changes, click the cancel button. To return to the list of the relocatees, click the back button.

### 7.11.1 Details Tab

When you edit the existing relocatee it shows the Details tab by default, the following screen will show up:



To make changes, click the edit button within the Details tab. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

### 7.11.1 Subject Prop Tab

When you click on the Subject Prop tab in the Relocation screen for a residential relocatee, the following will open:

For Non Residential Relocations the following screen will open:





To make changes, click the edit button within the Subject Property tab. You can select Purchase or Rent. If you select Purchase, the Acquisition Amount will be read only, which is populated from the Offer/Negotiation screen. If you select Rent, the Rent Amount can be filled in by the agent. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

You can select Purchase or Rent. If you select Purchase, the Acquisition Amount will be read only, which is populated from the Offer/Negotiation screen. If you select Rent, the Rent Amount can be filled in by the agent. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

### 7.11.2 Comparables Tab

When you click on the tab for a residential relocatee, the following will open:

To add a relocation comparable, please go to the Projects- Relo Comps screen,

To view a comparable, click the edit button in the row of the desired comparable and the following screen will open:



You can make changes or additions. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button. If you wish to include the comparable, click the Include box in the comparables table. You can choose as many as necessary. In order to select the most comparable you need to click on the Select checkbox in the table. To save the comparables you have chosen, click the save button. If you do not wish to save, click the cancel button.

When you click on the **Comparables** tab for a business relocatee, the following will open:

Include	Select	Comparable #	Business Name	Business Type	Address/Location	Zoning	Lot Size	Price/Rent	View
<input type="checkbox"/>	<input type="checkbox"/>	22	Test Business Name	Apartment Building				0	

To add a relocation comparable, please go to the Projects-Relo Comps screen, which is described in Section 6.2.6 of this manual. To view a comparable, click the view button in the row of the desired comparable and the following screen will open:

You can make changes or additions. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button. If you wish to include the comparable, click the include box in the comparables table.



You can choose as many as necessary. In order to select the most comparable click the Select checkbox. To save the comparables you have chosen, click the save button. If you do not wish to save, click the cancel button.

### 7.11.3 Replacement Tab

This tab displays the replacement housing or business location information for the relocatee. When you click on the Replacement tab for a business relocatee, the following will open:

To enter or edit the data, click the edit button within the Replacement tab. Enter the data and then click the save button to save you changes. If you do not wish to save the changes, click the cancel button.

When you click on the tab for a residential relocatee, the following will open:

To enter or edit the data, click the edit button within the Replacement tab. Enter the remaining data and then click the save button to save you changes. If you do not wish to save the changes, click the cancel button.



### 7.11.4 Computations Tab

When you click on the Computations tab, you will see the following field with a dropdown menu:



Details Subject Property Comparables Replacement **Computations** Pymt Summary Documents Diary Log

Type of Computation --Select Type of Computation--

The dropdown will have choices for different calculations depending on the Type and whether the relocatee is residential or business. The following sections will describe each of the relocation calculations available in PAECETrak™.

### 7.11.4.1 Replacement Housing Payment Computation-Owner

For a residential relocatee owner, when you choose the Replacement Housing Payment Computation-Owner from the dropdown, the following will open:

Details Subject Property Comparables Replacement **Computations** Pymt Summary Documents Diary Log

Type of Computation Replacement Housing Payment Computation - Owner

Approved By --Select Approved By-- Approved On

Sale Price of Most Comparable Dwelling 0.00

Less Acquisition Price of Subject Dwelling 0.00

Equals Replacement Housing Payment 0.00

Carve Out

Edit

To enter the data for this calculation, click the edit button. When you are done entering the data, click the save button. If you do not want to save, click the cancel button.

### 7.11.4.2 Replacement Housing Payment Computation- Tenant

For a residential relocatee tenant, when you choose the Replacement Housing Payment Computation-Owner calculation from the dropdown, the following will open:

Details Subject Property Comparables Replacement **Computations** Pymt Summary Documents Diary Log

Type of Computation Replacement Housing Payment Computation - Tenant

Approved By --Select Approved By-- Approved On

New Monthly Rent 0.00 per month X 48 months = 0.00

**Less Base Monthly Rent**

a. Actual Rent Paid (Average of Last 3 mos.) 0.00

Utilities (average of Last 12 mos.) 0.00 = 0.00

**OR**

b. Economic Rent 0.00

Utilities (average of Last 12 mos.) 0.00 = 0.00

c. Thirty Percent of Gross Monthly Income 0.00

d. Amounts Designated for Shelter & Utilities 0.00

Base Monthly Rent (Lesser of a OR b, c, d) 0.00 per month X 48 months = 0.00

Equals Indicated Rental Housing Payment (New Monthly Rent minus Base Monthly Rent) 0.00

Amount of First Installment 0.00

Amount of Second Installment 0.00

Tenant - Occupant

90 Day - Owner Occupant

180 Day - Owner Occupant

Edit

To enter the data for this calculation, click the edit button. When you are done entering the data, click the save button. If you do not want to save the calculation, click the cancel button.



### 7.11.4.3 Rent Supplement Payment for Tenant-Occupant

For a business relocatee tenant-occupant, when you choose the Rent Supplement Payment for Tenant-Occupant calculation from the dropdown, the following will open:

Type of Computation	Rent Supplement Payment for Tenant - Occupant	Approved On	
Approved By	--Select Approved By--	per Month X 48 Months	0.00
New Monthly Rent	0.00	per Month X 48 Months	0.00
Less Average/Economic Monthly Rent	0.00	Indicated Rental Payment	0.00

To enter the data for this calculation, click the edit button. When you are done entering the data, click the save button. If you so not want to save the calculation, click the cancel button.

### 7.11.4.4 Rent Supplement Payment for Owner-Occupant

For a business relocatee owner-occupant, when you choose the Rent Supplement Payment for Owner-Occupant calculation from the dropdown, the following will open:

Type of Computation	Rent Supplement Payment for Owner - Occupant	Approved On	
Approved By	--Select Approved By--	per Month X 48 Months	0.00
New Monthly Rent	0.00	per Month X 48 Months	0.00
Less Economic Monthly Rent	0.00	Indicated Rental Payment	0.00

To enter the data for this calculation, click the edit button. When you are done entering the data, click the save button. If you so not want to save the calculation, click the cancel button.

### 7.11.5 Pymt Summary Tab

When you click on the Pymt Summary Tab for a residential relocatee, the following screen will open:



To enter the data, click the edit button. Check the boxes that apply and complete the fields that apply. To view the fixed payment schedule, click the View Fixed Payment Schedule button. When you are done entering the data, click the save button. If you do not want to save, click the cancel button.

### 7.11.6 Claims Tab

When you click the Claims tab, the following screen will open:

To add a new claim, click the Add New button and the following screen will open:



When you are done entering the data, click the save button. If you so not want to save, click the cancel button. To add a new claim type row in the table, click the Add New button and the following screen will open:

Choose a claim type from the dropdown menu and enter the remaining fields. When you are done entering the data, click the save button. If you so not want to save, click the cancel button. To view or edit a claim type in the table, click the edit button in the applicable row. To go back to the main Claims screen, click the back button.

### 7.11.7 Documents Tab

The documents screen allows you to open and generate documents associated with a property relocation. When you click on the Documents tab, the following screen will open:

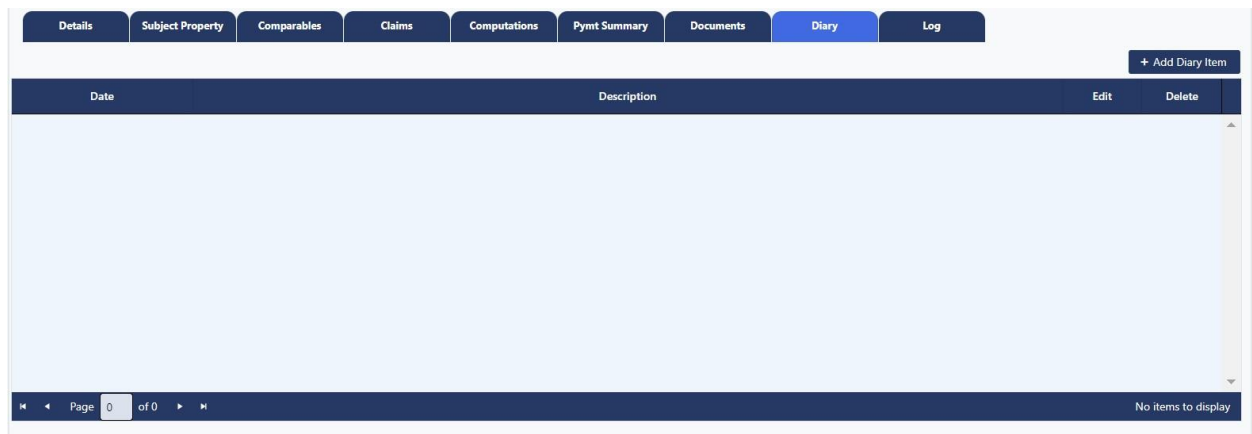
Document	Generate	Date Last Generated	Open Latest
30 Day Notice to Vacate Letter	[Generate]		[Open Latest]
90 Day Occupance (90 Day Notice of Occupancy) Letter	[Generate]		[Open Latest]
Administrative Cost Log	[Generate]		[Open Latest]
Bill of Sale (RE2166)	[Generate]		[Open Latest]
Business Actual Moving Expenses Worksheet (BF1030)	[Generate]		[Open Latest]



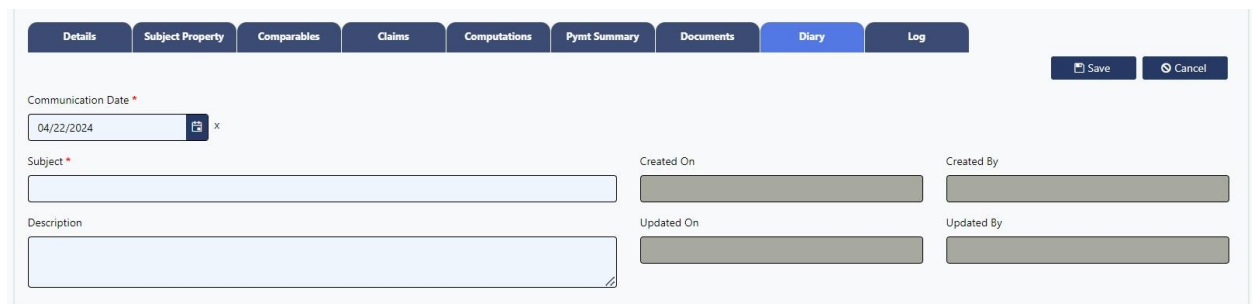
You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Relocation Log (Section 7.11.9). The next time you open the Documents tab, the table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.

### 7.11.8 Diary Tab

When you click on the Diary tab, the following screen will open:



To add a Diary item, click the Add Diary Item button and the following screen will open:



Enter the requested fields. When you are done entering the data, click the save button. If you do not want to save, click the cancel button. The Diary is then saved in the Log (Section 7.11.9). To view or edit a Diary in the table, click the edit button in the applicable row.

### 7.11.9 Log Tab

When you click on the Log tab, the following screen will open:





Date	Type	Subject	View	Edit	E-Auth	Delete	Admin Delete
	Email	Relocation Case Report is ready for review					

Details of the log are described in Section 5 of this manual.

### 7.12 Buildings/Structures

The “Buildings/Structures” module allows users to keep track of any building improvements on the property as part of property maintenance. The Buildings/Structures module can be accessed from the Parcel Menu by clicking on the Buildings/Structures menu item and the following will open:

Type of Structure	Partition	Bid Opening	Bid Executed	Demo Completed	Edit	Delete
Residential		03/31/2015	05/08/2015	08/10/2015		

The list will show all property maintenance units for a parcel. Since a parcel may contain more than one partition, the maintenance may occur on one partition or multiple partitions for a parcel. To edit or view buildings/structure data, click the edit button in the row of the desired partition, type of structure. To delete a structure you can click on the delete button

To add a new structure to the parcel for maintenance/demolition click on the Add New button and the following screen will open:



Responsible DOT Office: Waukesha  
Project ID: 1060-33-26  
Parcel No: 2  
Parcel Name: Brian E Walker and Irene Walker, hus

**Buildings/Structure Details**

Partition:   
Type of Structure:   
Disposition Action: --Select Disposition Action--  
Property Mgmt. Agent: --Select Property Mgmt. Agent--  
Description:   
Keys Received: --Select Keys Received--

Buttons: Save, Cancel

Please enter the required information to enter a structure for the acquired parcel. If there is only one structure for maintenance/demolition you do not need to enter a Partition. If there are multiple structures then please enter partition for each separate structure. Each structure should have a unique partition. The Prop Mgmt Agent is a dropdown field to be entered as an assignment on the Acquisition Team screen (Section 7.2) within the Parcel. If you select the Keys Received field as Yes then a date shows up next to the field to enter the date when the keys were received by the property management agent. After entering all of these fields, click the save button at the top of the screen. If you do not wish to save, click the cancel button to return to the main list of buildings/structures for a parcel.

### 7.12.1 Details Tab

When you come to the Buildings/Structures screen, Details tab below will show up by default, the following will open:



**Buildings/Structure Details**

← Back Edit

Partition:  Type of Structure \*: Residential Disposition Action \*: Demolition Property Mgmt. Agent: Alane Stephens

Description: Single family residence, 1-car detached garage, deck Keys Received: Yes Date Received: 12/02/2014

Details Maintenance Saleable Items **HazMat/Insp** Payment Info Documents Log

Property Address:  Bid Opening: 03/31/2015 Contractor: Guelig Waste Removal & Demo LLC Demo Completed: 08/10/2015

Address Line 2:  Bid Executed: 05/08/2015 Contract #: 3540201 Target Demo:

City:  State: WI Zip:  Comments:

Edit

Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the screen.

### 7.12.2 HazMat/InspTab

When you click on the HazMat/InspTab, the following will open:

**Buildings/Structure Details**

← Back Edit

Partition:  Type of Structure \*: Residential Disposition Action \*: Demolition Property Mgmt. Agent: Alane Stephens

Description: Single family residence, 1-car detached garage, deck Keys Received: Yes Date Received: 12/02/2014

Details Maintenance Saleable Items **HazMat/Insp** Payment Info Documents Log

+ Add New

Material	Inspector	Inspection Date	Removal Req'd	Abatement Contractor	Removal Date	Edit	Delete
Asbestos	Delahey Industries	12/09/2014	Yes				

Page 1 of 1 1 - 1 of 1 items

This list will keep track of hazardous materials and related information about asbestos inspection and asbestos removal for each structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the delete button for the desired row in the list. To add a new entry in the table you can click on the Add New button and the following screen will open:



The screenshot shows a web form titled "HazMat/Insp Details" with a close button (X) in the top right corner. At the top right of the form area are "Save" and "Cancel" buttons. The form contains several input fields: "Material \*" is a dropdown menu currently showing "--Select Material--"; "Inspector" is a text input field; "Inspection Date" is a date picker with a calendar icon and a close button (X); "Removal Req." is a dropdown menu showing "--Select Removal Req.-"; "Abatement Contractor" is a text input field; and "Removal Date" is another date picker with a calendar icon and a close button (X).

Please select the type of material from the dropdown, if the material you are looking for is not in the available list you can raise a service request ticket using the E-help module. Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the list.

### 7.12.3 Maintenance Tab

When you click on the Maintenance Tab, the following will open:

The screenshot shows the "Buildings/Structure Details" page with the "Maintenance" tab selected. The form includes fields for "Partition", "Type of Structure" (set to "Residential"), "Disposition Action" (set to "Demolition"), "Property Mgmt. Agent" (set to "Alane Stephens"), "Description" (set to "Single family residence, 1-car detached garage, deck"), "Keys Received" (set to "Yes"), and "Date Received" (set to "12/02/2014"). Below the form is a navigation bar with tabs: "Details", "Maintenance" (active), "Saleable Items", "HazMat/Insp", "Payment Info", "Documents", and "Log". An "Add New" button is located to the right of the navigation bar. Below the navigation bar is a table with columns: "Action", "Amount", "Performed On", "Comments", "Edit", and "Delete". The table is currently empty, and a message at the bottom right states "No items to display". A pagination bar at the bottom left shows "Page 0 of 0".

This list will keep track of list of maintenance type of actions performed on this structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the delete button for the desired row in the list. To add a new entry in the table you can click on the Add New button and the following screen will open:



You must specify the action to be performed on the structure and the amount to be spent for the action performed. Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the list.

### 7.12.4 Saleable Items Tab

When you click on the Saleable Items Tab, the following will open:

This list will keep track of list of saleable items on this structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the delete button for the desired row in the list. To add a new entry in the table you can click on the Add New button and the following screen will open:



You must specify the description of the saleable item. Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the list.

### 7.12.5 Payment Info Tab

When you click on the payment info tab, the following screen will open:

To add a payment, click the add new button and the following will open:



### Payment Info Details



Receipt #

Accounting Code \*

Amount  Date   x Payment Type

Comments

You must choose a Class Code from the list below

Accounting Code \*

- Select Accounting Code--
- Select Accounting Code--
- 9413 - R/E Rental Income Long-Term
- 9412 - R/E Rental Income Short-Term
- 5941000 - R/E Sale of Building & Personal Property
- 9410 - R/E Sale of Land or Land Rights
- 9990 - Sales Tax

You can then enter the Date, Amount and choose the Payment Type from the list below



Payment Type

Down Payment ▼

--Select Payment Type--

Deposit

Down Payment

Final Payment

Miscellaneous

Payment

When you are done entering the data, click the save button. If you do not wish to enter a new Payment, click the cancel button.

You will return to the payment tab with the list of payments that have been added to the system. There is now a generate button in the “Generate Receipt” column to generate “Property Sales/Rental Receipt Transmittal”. The document will be saved in the Log. If you wish to delete a payment that has been added, click the delete button in the row of the payment you wish to delete.

### 7.12.6 Documents Tab

To generate all of the forms and letters associated with buildings/structures, click the Documents tab and the following will open:

Buildings/Structure Details

← Back Edit

Partition:

Type of Structure \*: Residential

Disposition Action \*: Demolition ▼

Property Mgmt. Agent: Alane Stephens ▼

Description: Single family residence, 1-car detached garage, deck

Keys Received: Yes ▼

Date Received: 12/02/2014

Details Maintenance Saleable Items HazMat/Insp Payment Info Documents Log

Document	Generate	Date Last Generated	Open Latest
DWD Letter	📄		D

Page 1 of 1 1 - 1 of 1 items

The name of the document/letter is listed in the left hand column. To generate the letter/document you will click the generate button in the Generate column.





The generated document is automatically saved in the log. You can open the document from the log (Section 5) or by clicking the open button in the documents tab of the buildings/structures screen as described below. Options for changing the template or the way it is generated are described in Section 8.10. The Date Last Generated column will show the date that the document was last generated since a document can be generated multiple times. If the document has not yet been generated, there will be no date. To open the document from this screen, click the open button in the Open Last Created column. This button will open the most recent of that document from the log.

### 7.12.7 Log Tab

When you click on the Log tab, the following will open:

Details of the log are described in Section 5 of this manual.

### 7.13 Parcel Log

On the Parcel Menu, there is a Parcel Log. This log will include all of the entries from all Logs within each module of the Parcel Menu. When you click Parcel Log on the menu, the following will open:



This log functions the same as all other logs throughout READS. For instructions on the log, refer to Section 5.0 of this User Manual.



## 7.14 Litigation

The “Litigations” module allows users to keep track of the litigation cases and appeals. The Litigations module can be accessed from the Parcel Central Menu by clicking on the Litigations menu item and the following will open:

The screenshot shows a web interface titled "Litigation - Attorney Client Privileged Info". At the top left, there is a dropdown menu labeled "Litigation Completed" with the text "--Select Litigation Completed--". To the right of this menu is a button labeled "+ Add Case/Appeal". Below the menu and button is a table with the following columns: "Case #", "Seq #", "Appealed To", "Type of Appeal", "Date Appeal Filed", "Edit", and "Delete". The table is currently empty. At the bottom of the table area, there is a pagination control showing "Page 0 of 0" and a status message "No items to display".

You have the option to indicate if a litigation is completed by selecting from the litigation completed dropdown list:. To view the details for a litigation case, click the edit button in the applicable row. To add a litigation case/appeal, click the button and the following screen will open:

The screenshot shows the "Litigation - Attorney Client Privileged Info" form for adding a new case. At the top left, there is a checkbox labeled "Case Closed". To the right of this checkbox are two buttons: "Save" and "Cancel". Below the checkbox and buttons are several input fields and dropdown menus arranged in two rows. The first row contains: "Case # \*", "Sequence #" (with a value of "1"), "Appealed To" (dropdown), "Defendant's Attorney" (dropdown), "Judge" (text input), "Appeal Received in Region" (text input with a calendar icon), and "Date Appeal Filed" (text input with a calendar icon). The second row contains: "Litigation Agent \*" (dropdown), "Type of Appeal" (dropdown), "Plaintiff's Attorney" (dropdown), "Date of Service" (text input with a calendar icon), "Appeal End Date" (text input with a value of "10/25/2013" and a calendar icon), and "Award/Deed Amount" (text input with a value of "10,000.00").

You will need to choose a Case # and Litigation Agent. The Litigation Agent dropdown list will populate from the Acquisition Team module located under the Parcel Central Menu.

The Plaintiff Attorney dropdown list on the Litigation screen will appear from the Participants screen. If you need to add a new record you need to go to the Participants menu and add a new plaintiff attorney

When you have finished entering the data fields on the Litigation screen, you can click the save button or if you do not wish to save any changes, click the cancel button.

### 7.14.1 Disposition Tab

When you click on the Disposition tab, the following will open:



Disposition	Witnesses	Case Report	Interest Calc	Documents	Diary	Log
<a href="#">Edit</a>						
Disposition Type						
<input checked="" type="radio"/> Pre-Trial/Mediation		<input type="radio"/> Verdict		<input type="radio"/> Commission Order		
Pre-Trial Settlement Date	Order for Entry of Judgment	Total Interest (\$)	Mediation			
04/30/2024	05/08/2024	0.00	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Mediated Settlement Amount	Plaintiff Attorney Fees	Mediator's Name	Mediation Fee	Dismissed Date		
400.00	0.00		0.00			
Settlement Amount	Other Plaintiff Attorney Costs	Mediation Date	Mediation Successful	Dismissed By		
1,200.00	0.00		--Select Mediation Successful--	--Select Dismissed By--		

To make changes, click the edit button within the Disposition tab. You can select the type of disposition by selecting either Pre-Trial/Mediation, Verdict, or Commission Order. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.



### 7.14.2 Witnesses Tab

When you click on the Witnesses tab, the following will open:

The screenshot shows a web application interface with a top navigation bar containing tabs: Disposition, Witnesses (selected), Case Report, Interest Calc, Documents, Diary, and Log. Below the navigation bar, there are two main sections: "Defendant's Witnesses" and "Plaintiff's Witnesses". Each section has a "+ Add Witness" button in the top right corner. The "Defendant's Witnesses" section contains a table with the following data:

Witness Name	Type of Witness	Before (\$)	After (\$)	Damages	Remarks	Testified	Edit	Delete
test	Other Witnesses	2,000.00	300.00	1,700.00	test remarks	No		

Below the table, there is a pagination bar showing "Page 1 of 1" and "1 - 1 of 1 items".

You can add/edit a defendant's or a plaintiff's Witness in the table.

To add a new Defendant Witness, click the Add New button above the appropriate table and the following screen will open:

The screenshot shows a "Defendant's Witness Details" form with a close button (X) in the top right corner. The form contains the following fields and controls:

- Witness Name \***: A text input field.
- Type of Witness**: A dropdown menu with "--Select Type of Witness--".
- Testified**: A dropdown menu with "--Select Testified--".
- Before (\$)**: A numeric input field with the value "0.00".
- After (\$)**: A numeric input field with the value "0.00".
- Damages**: A numeric input field with the value "0.00".
- Remarks**: A large text area for entering notes.
- Save** and **Cancel** buttons are located at the top of the form.



Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

To view or edit the details for a Defendant Witness, click the edit button in the applicable row.

If you wish to delete a defendant witness click on the delete button in the applicable row

To add a new Plaintiff Witness, click the Add New button above the appropriate table and the following screen will open:

Plaintiff's Witness Details ✕

---

Save Cancel

Witness Name \*

Type of Witness Testified

--Select Type of Witness-- --Select Testified--

Before (\$) After (\$) Damages

0.00 0.00 0.00

Remarks

Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

To view or edit the details for a Plaintiff Witness, click the edit button in the applicable row.

### 7.14.3 Case Report Tab

When you click on the Case Report tab, the following will open:



The screenshot shows the 'Case Report' tab with several sections:

- Disposition**, **Witnesses**, **Case Report** (active), **Interest Calc**, **Documents**, **Diary**, **Log**
- Property Description:** Two text areas for 'Briefly describe the property in the before condition' and 'Briefly describe the property in the after condition'.
- Case Summary:** A text area for a summary.
- Recommendation of Counsel:** A text area for counsel recommendations.
- Regional Recommendation:** A text area for regional recommendations.
- Other Project Resources:** A table with columns: Name, Telephone Number, Email Address, Edit, Delete. It contains one row: 'Test Name (Test Title)', '201-889-3838', 'r@bemsys.com'. There is an '+ Add New' button and a table footer showing 'Page 1 of 1' and '1 - 1 of 1 items'.

You have the option to view or edit data in the following fields: Property Description, Case Summary, Recommendation of Counsel, Regional Recommendation, or Other Project Resources. To add Other Project Resources, click the Add New button and the following screen will open:

The 'Other Project Resources' form includes the following fields:

- Name \*** (required)
- Title**
- Telephone No.**
- Email Address**
- Mailing Address** (two stacked text areas)
- City**, **State** (with a dropdown arrow), **Zip**

Buttons for **Save** and **Cancel** are located at the top right.

Enter the data and then click the save button to save you changes. If you do not wish to save the changes, click the cancel button. To view or edit a Project resource entry, click the edit button in the applicable row.

#### 7.14.4 Interest Calc Tab

When you click on the Interest Calc tab, the following will open:



To edit the interest percentage or date of payment, click the edit button. Enter the data and then click the save button to save your changes. If you do not wish to save the changes, click the cancel button.

### 7.14.5 Documents Tab

The documents screen allows you to open and generate documents associated with a property litigation. When you click on the Documents tab, the following screen will open:

Document	Generate	Date Last Generated	Open Latest
Litigation Diary (RE1957)			
Litigation Report and Case Summary (RE1651)			

You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Litigation Log (Section 7.12.7). The next time you open the Documents tab, the table will be updated with the newly generated document date last generated.

To open the latest document created, click on the open latest button in the row of the document you wish to open.

### 7.14.6 Diary Tab

When you click on the diary tab, the following screen will open:

Date	Description	Edit	Delete





To enter a diary entry, click the add diary item button and the following will open:

This form is the same as in the Log, as discussed in Section 5.0. The current date will be filled in by default but can be edited if necessary. The Subject is a required field and must be entered. The Description is not required but should be entered.

Once you have completed entering data, click the save button. If you do not wish to save the data you have entered, click the cancel button. You will then return to the Diary tab listing. If you would like to edit a diary item, click the edit button in the row of the item you wish to edit and the form above will open. If you wish to delete a diary item, click the delete button **X** in the row of the action you wish to delete.

### 7.14.7 Log Tab

When you click on the Log tab, the following screen will open:

Details of the log are described in Section 5 of this manual. However, one very important aspect of the log for the litigations process is entering Litigation Diary Items by clicking the Add Diary button.

### 7.15 Payment Request

This module allows you to create and track payment requests for a parcel. You can access the Payment Request by clicking on the Payment Request module within Parcel and the following screen will open:



Payment Request Information

Payee:  Acct Code: --Select Acct Code-- Payment Type: --Select Payment Type-- Refresh + Create Payment Request

Date Created	Payment Type	Account Code	Payee	Status	Check Handling	Chk Cut	Check/ACH#	Amount	Edit	Delete
02/18/2024	Incidentals	8700230		Check Issued	Payee	03/11/2024	0000983557	5,000.00		
02/18/2024	Incidentals	8700230		Check Issued	Payee	03/11/2024	0000983558	5,000.00		
02/18/2024	Incidentals	8700230		Check Issued	Payee	03/11/2024	0000983559	5,000.00		
02/18/2024	Incidentals	8700230		Check Issued	Payee	03/11/2024	0000984864	5,000.00		
03/07/2024	Relocation Claims	8700161	Sup Lidgerwood-Mundy Corp	Audit	Region Office / Consultant			7,000.00		

Page 1 of 1 1 - 5 of 5 items

You can use the filters on the top portion of the screen to filter the list of Payment requests. Once you enter the information in the filters you can click the Refresh button to show required payment request records. In order to edit an existing payment request record you can click on the edit button in the desired row of the payment request. If you wish to delete a payment request created for a parcel click on the delete button in the desired row. If you try to delete a payment request where the status is Audit, Check Issued or Check Re-issued then the following message will pop up:

**Alert**

Payment Request has already been submitted, please contact the CO.

**OK**

You can create a new payment request by clicking on the Create Payment Request button and the following screen will open:



**Payment Request Details** Save Cancel

Date Created: 04/20/2024  x Account Code:  Invoice ID:  Check Amount: 0.00  Date Submitted to CO:  Submitted By:

Payment Type: --Select Payment Type--  Rush Payment  Municipality/Star Vendor  Owner Address:

Payee 1:  + Address Line 2:  Check/ACH#:  Check Cut Date:

Payee 2:  + City:  State: WI  Zip:

Check Handling: --Select Check Handling-- Payment Message:

Comments:

**STAR / PeopleSoft**

Prime Org / Dept. ID	Category / Act. Desc.
<input type="text" value="1025240000"/>	<input type="text" value="0010REALSTATEA"/>
Fund	Apprtn.
<input type="text" value="21100"/>	<input type="text" value="96100"/>
PO #	<input type="text"/>

You must enter a Payment type, by selecting one the class code will be selected automatically. If it requires a Rush Payment then please check the Rush Payment checkbox. Once its checked and submitted to the central office for processing this payment request entry will be tagged as a rush payment and needs immediate attention. The Payable to can be selected from the dropdown listing the participants or if you need to enter a name which is not a participant you can click on the button next to the dropdown and the dropdown will convert to a free form text where you can enter the name of the person you want to address the check to.

To convert it to the dropdown of participants you can click on the button next to the text field and will convert it to dropdown of list of participants for the parcel

You must also enter the check amount on the payment request. For relocation claims and additional parcel costs you will see a table on the bottom portion of the screen which will list all the costs associated with that payment type entered in the system. Relocation claims can be entered within Relocation section (Section 7.11.6) and additional parcel costs can be entered as explained in Section 7.10.

Lists of Pending Costs

Include	Type	Cost	Amount

Page 0 of 0 No items to display

You can click on the Include checkbox in the desired row in order to include a cost in the payment request. As you check the cost items the total check amount will get calculated based



on the amount entered in the Amount field in the table. Once you are done entering the information on the screen click the Save button, if you do not wish to save the changes click the Cancel button. Once the payment request information is saved you can generate the payment request by clicking on the Generate Payment Request button in order to view a generated payment request you can click on the View Payment Request button. Once the payment request is created and ready for submission you can click on the Submit Payment Request to CO button. Once clicked the following message pops up:

**Alert**

Are you sure you want to Submit the Payment Request to CO?

**Project ID:** 1674-01-22  
**Parcel No:** 5  
**Account Code:** 8700230  
**Payment Type:** Incidentals

OK Cancel

By clicking ok the payment request is submitted to central office for processing and the screen will refresh with a “Submitted” status as shown below:

**Payment Request Details**

← Back ✎ Edit

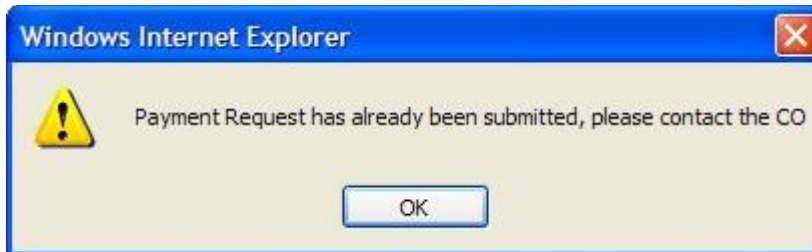
Date Created	Account Code	Invoice ID	Check Amount *	Date Submitted to CO	Submitted By
04/20/2024	8700230	REAMAD511_16740122	10.00	04/19/2024	Ritesh Shah
Payment Type *	<input type="checkbox"/> Rush Payment	Address *		Payment Status	
Incidentals		.4395 Swallow Banks Lane		Submitted	
Payee 1 *		Address Line 2		Check/ACH#	Check Cut Date
Payee 2		City *	State *	Zip *	
		Oshkosh	WI	54904-9349	
Check Handling *		Payment Message *			
Payee		test			
Comments					
test					

Generate Payment Request View Payment Request Submit Payment Request to CO

Once central office starts processing the payment request the status will automatically change to “Audit” status. Once the status is changed to “Audit” you will not be allowed to make any changes or delete the payment request. If for some reason the payment request needs to be



modified central office staff will change the status to “Returned” which will allow you to make changes to the payment request and resend it for processing. If you try to delete a payment request with an Audit status you will see the following message:



Once the payment is processed and check has been sent the status will change to Check Issued. If the payment needs to be cancelled and redeposited, the central office will redeposit the check as a negative amount which will show up as a separate line entry in the list of payment requests for a parcel. If for some reason the check needs to be re issued the payment processing department will change the status to Check Reissued.



## 8.0 LEASES

The Leases module of READS is used to keep track all of the leased properties (long term lease) managed by Wisconsin Department of Transportation. It also tracks any leaseback (short term lease) agreements needed if a displacee is going to remain on the parcel after closing. To access the Leases module click on Leases on the left side menu and the following window will open:

The screenshot shows the 'Lease Listing' interface. On the left is a sidebar menu with options: Project, Parcel Central, Payment Vouchers, Land Inventory, Leases (selected), Contract, Comparables, Vendor Maintenance, Acquisition Team, Region Office Setup, My Ticklers, and Reports. The main area contains a search and filter section with fields for Responsible DOT Office (Eau Claire), Project ID, Parcel #, County (dropdown), File No, Lease Type (dropdown), Lessee, Lease Start From, To, Lease End From, To, and Lease Category (radio buttons for Non Relo Lease, Leasebacks, All). There are also checkboxes for 'Show Inactive Leases' and buttons for '+ Add Non Relo Lease', '+ Add Leaseback', '+ Add Non Relo Lease using Existing Parcels', and 'Refresh'. Below this is a table with columns: Responsible DOT Office, Project ID, Parcel #, County, Lessee, Lease Type, Lease Category, Active, Edit, and Delete. The table contains six rows of lease data.

Responsible DOT Office	Project ID	Parcel #	County	Lessee	Lease Type	Lease Category	Active	Edit	Delete
Eau Claire	1190-00-22	39	Eau Claire	City of Altoona - Canoe Landing/Parking lot	Scenic	Lease	Yes		
Eau Claire	0631-29-02	1	Clark	Gaylord Kaduce	Agricultural	Lease	Yes		
Eau Claire	T94-2(13)	3	Eau Claire	City of Eau Claire - Dog Park	Scenic	Lease	Yes		
Eau Claire	8110-02-21	23	St Croix	St Croix County Emergency Support Services	Commercial	Lease	Yes		
Eau Claire	1190-00-22	41	Eau Claire	City of Altoona-Trail	Scenic	Lease	Yes		
Eau Claire	7091-06-21	9	Eau Claire	Wayne R. and Marjorie N. Peters	Commercial	Lease	Yes		

At the bottom of the table, there is a pagination bar showing 'Page 1 of 2' and '1 - 10 of 13 items'.

This list will show all Non Relocation Leases and Leasebacks. You can use the fields at the top of the list to filter the list. Once you have entered the data or chosen from the dropdowns to filter the list, you will have to click the refresh button. You can choose to show only Non Relocation Leases or only Leasebacks. Also by default the list will only show Active Leases, if you need to view inactive leases, click the Show Inactive Leases checkbox and click the refresh button.

If you belong to one of the region offices the list will get filtered by the region office.

### 8.1 Adding a Lease/Leaseback

To add a new non relocation lease record, click add non relo lease button at the top of the main Leases screen. This will allow you to add a new lease property that is not associated with an existing parcel in READS. To add a property to be leased that is associated with a parcel that was previously entered in READS, click the Add Non Relo Lease using Existing parcels button the following screen will open:



**Lease using Existing Parcel**

Please select the Responsible DOT Office and Project ID to filter the list of Parcels:

Responsible DOT Office \*    Project ID \*    County

Madison    1390    --Select County--

← Back    Refresh

Select the desired Parcel from the list to create a Non Relocation Lease record:

Responsible DOT Office	Project ID	Highway	Parcel No	County	Select
Madison	1390-01-26	STH - 026	1	Dodge	+
Madison	1390-01-26	STH - 026	2	Dodge	+
Madison	1390-01-26	STH - 026	3	Dodge	+
Madison	1390-01-26	STH - 026	4	Dodge	+
Madison	1390-01-26	STH - 026	6	Dodge	+
Madison	1390-01-26	STH - 026	7	Dodge	+
Madison	1390-01-26	STH - 026	8	Dodge	+
Madison	1390-01-26	STH - 026	9	Dodge	+

Page 1 of 50    1 - 10 of 500 items

This form is used to locate the parcel you would like to copy into the Leases module. By default the Region office is selected depending on which region office the logged in user is associated with it. You can enter a project id and/or a County to filter the list of parcels you want to create a lease record from. Once the filters are entered hit the refresh button to see the list of parcels that match the criteria:

You can then select the parcel to copy into the leases module by clicking on the Select button in the row you want to copy and an alert message shows up to confirm your selection:



Click Ok to create the record, the project/parcel details of the original acquisition are copied from the selected parcel. The following screen will open:



All the data fields are copied from the acquisition modules which includes the Region Office, Project Id, Parcel No, County and the Property Address.

To add a brand-new lease property record that is not associated with an existing parcel, Click the add new non relo lease button and similar screen would open up with the difference being you have to enter all the project and parcel related data.

In addition to this you must enter the Lessee and the address of the lessee (for non relocation leases only), as well as the lease start and end dates. Also enter the rental amount and payment frequency. You can select the payment frequency for non relocation long term leases.

Once you have completed entering data, click the save button. This will add a new lease record. To return to leases listing, click the back button or click the cancel button.

Leaseback records are relocation short term leases allowing existing relocatee to occupy the property for short period of time. You can add a leaseback record only from existing relocation records entered in the system. To add a Leaseback (Relocation Lease or Short Term lease) please click on the Add Leaseback button and will open the following screen:





**Leasebacks**

Please select the Responsible DOT Office and Project ID to filter the list of the Parcels:

Responsible DOT Office \*  Project ID \*  County  Parcel No  Relocatee

Select the desired Relocation Unit # from the list to create a Leaseback record:

Responsible DOT Office	Project ID	Highway	Parcel No	County	Relocatee	Relo Unit #	Select
No items to display							

Page 1 of 1

By default the region office will be selected, you must enter the Project ID. Also enter other fields as required which will filter the list of relocation records for a parcel you can copy the lessee information from. Once entered click the refresh button which will show you the list of relocation records you can create a leaseback record from, as shown below:

**Leasebacks**

Please select the Responsible DOT Office and Project ID to filter the list of the Parcels:

Responsible DOT Office \*  Project ID \*  County  Parcel No  Relocatee

Select the desired Relocation Unit # from the list to create a Leaseback record:

Responsible DOT Office	Project ID	Highway	Parcel No	County	Relocatee	Relo Unit #	Select
Madison	1390-04-34	STH 26	7	Jefferson	Robert G Rupprecht and Nancy B Rupprecht	1	<input type="button" value="+"/>
Madison	1390-04-33	STH 26	1	Jefferson	Justin Albedyll and Todd Shlender	1	<input type="button" value="+"/>
Madison	1390-04-32	STH 26	7	Rock	Sandra D Mater	1	<input type="button" value="+"/>
Madison	1390-04-32	STH 26	6	Jefferson	Lloyd L Robbins and Lynn	1	<input type="button" value="+"/>

Page 1 of 11

1 - 10 of 104 items

Please click on the Select button in the table for the row you want to create a leaseback record from the following message shows up:



Click Ok to create a leaseback record from an existing relocatee record and the following opens up:

The entire project, parcel and relocation information is copied over from the acquisition side and shows up as read only fields on the leaseback details screen

In addition to this you must enter lease start and end dates, as well as the rental amount and payment frequency. The Payment frequency should be set to monthly payments for leasebacks.

Once you have completed entering data, click the save button. This will add a new lease record. To return to leases listing, click the back button or click the cancel button.

The following sections will discuss all of the tabs that are a part of the leases module.

## 8.2 Details Tab

This tab will open by default when a user comes to the Lease details screen. Also clicking on the Details tab will show the following screen will open:



The user should enter the information on this screen. In order edit the user should click on the Edit button, Enter the information, and hit the Save button. Once the user is done entering the information the user can enter the Cancel button.

### 8.3 Payment Info Tab

This tab will list a payment schedule automatically created for a lease or a leaseback record. When a user opens a lease record the Payment Info tab opens by default. The screen design remains the same for non relocation leases and leaseback. The following screen opens when the Payment Info tab is clicked:

Deposit ID	Date Due	Amount Due	Check #	Check Date	Receipt Date	Amount	Account Code	Payment Type	Description	Generate Receipt	Edit	Delete
	04/01/2024	1,000.00	0			0.00						
	05/01/2024	1,000.00	0			0.00						
	06/01/2024	1,000.00	0			0.00						
	07/01/2024	1,000.00	0			0.00						
	08/01/2024	1,000.00	0			0.00						

Once the lease start, end dates, rental amount and the payment frequency is entered on the main leases screen the system automatically creates a payment schedule within the Payment Info tab

For leasebacks only monthly payments can be made so the payment frequency is always set to monthly payments:

Once this information is entered on the leases or leaseback screen a payment schedule gets created in the system. If you modify any of the information about the lease start, end dates, rental amount or the payment frequency the system will recreate the payment schedule. For leasebacks the first payment due date will also consider the rent free period. The following screen will show once the payment schedule is created for the lease:



<span>Details</span> <span>Assignments</span> <span>Payment Info</span> <span>Terms</span> <span>Documents</span> <span>Log</span> <span style="float: right;">+ Add New</span>												
Deposit ID	Date Due	Amount Due	Check #	Check Date	Receipt Date	Amount	Account Code	Payment Type	Description	Generate Receipt	Edit	Delete
	04/01/2024	1,000.00	0			0.00						
	05/01/2024	1,000.00	0			0.00						
	06/01/2024	1,000.00	0			0.00						
	07/01/2024	1,000.00	0			0.00						
	08/01/2024	1,000.00	0			0.00						

Page 1 of 3 1 - 5 of 12 items

Depending on how the property management agent and the lessee work out the payments the agent can modify the existing payment schedule by clicking on the Edit button within the Payment Info tab. Once you have completed entering data, click the save button or click the cancel button

You can also add a new record in the table with a specific payment due date and the following screen will show up:

Payment Info Details ✕

---

Save
Cancel

Deposit ID

Amount

Check #

Comments

Accounting Code \*   
 --Select Accounting Code--

Date  x

Check Date  x

Payment Type   
 --Select Payment Type--

If you need to delete any of the existing payment records created for the lease period you can click on the delete button to delete a record from the table. The system will also calculate the payment schedule for lease or leaseback renewals.

You can also generate the Rental Receipt for each payment received by clicking on the generate button for each row in the table

### 8.4 Terms Tab

When you click on the Terms tab, the following will open:



Original/Renewal	Renewal #	Lease Start	Lease End	Lease Amount	Renewal Comments	Edit	Delete
Original	0	04/01/2024	03/31/2025	1,000.00			

To enter a renewal option, click the add lease renewal button and the following will open:

Lease Term Details

Renewal No.   Original  Renewal

Lessee \*  Renewal Start \*  x  Current Lease Signed   x  x  x

Lessee Address  Renewal End \*  x  x  Use and Occupancy Agreement Signed

Address Line 2  Create Payment Every   Proof of Insurance Through  x  Insurance Required

City  State  Zip   Months  Years Rental Amount \*  Comments

Enter the necessary fields and click the save button. This will add a row to the table on the screen. If you do not wish to save the renewal, click the cancel button.

To edit the details that were entered for a lease renewal, click the edit button in the row of the desired lease renewal and the window above will open. Make the necessary changes and click the save button. If you do not wish to save the changes, click the cancel button **Cancel**.

To delete a lease renewal that has been entered, click the delete button in the row of the renewal option that you wish to delete.

## 8.5 Assignment Tab

When you click on the assignment tab, the following screen will open:

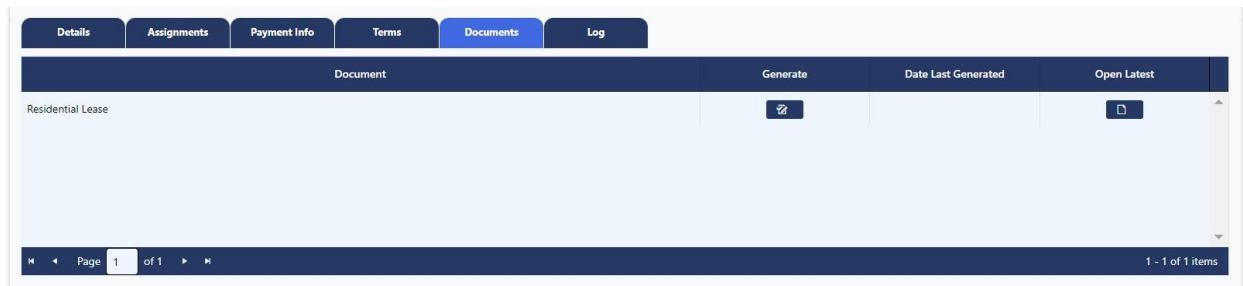
Role ↑	Name	Email	Phone	Delete
--------	------	-------	-------	--------



The table identifies role assignments established for the lease record. To add a new assignment, click the Add Assignment button. To complete adding a new assignment, please see Section 7.2 or Section 8.5 for instructions on completing this form. To delete an assignment that has been added, click the delete button in the row of the assignment you wish to delete.

### 8.6 Documents Tab

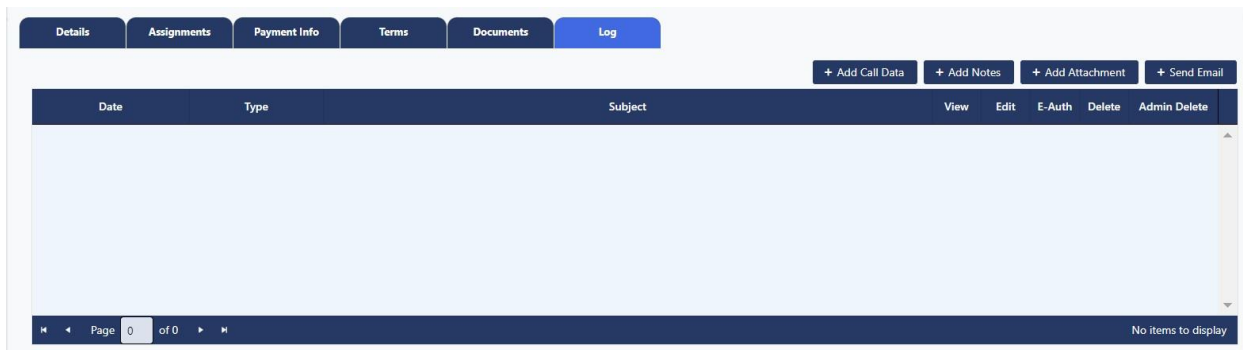
The documents screen allows you to open and generate documents associated with a lease/leaseback. When you click on the documents tab, the following screen will open:



You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Microsoft Word® and will be saved in the overall Log (Section 5.0) and the Leases Log (Section 12.6). The next time you open the Documents tab, the table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.

### 8.7 Log Tab

When you click on the Log tab. The following screen will open:



Instructions on editing and adding to the Log are included in Section 5.0.

## 9.0 LAND INVENTORY

The Land Inv module of READS is used to track all the surplus land parcels managed by WisDOT, including details regarding the original purchase and disposition of the surplus land. The Land Inv module can be accessed from the left menu. The following window will open:



Initially, this list will show all of the surplus land parcels stored in the database. However, there are several different fields (Responsible DOT Office, County, Project ID, Parcel No, Type of Disposal, Classification, and File No) at the top of the screen that can be used to filter the list to show only the properties you are interested in viewing. You can use more than one filter at a time if needed. Once you have entered the data or chosen from the dropdown to filter the list, click the refresh button.

To view and/or edit the details for a particular land inventory record, click on the corresponding edit button. The following screen will open:

You will then need to click the edit button at the top of the screen to make changes. Complete the requested fields as needed. The details on this screen are described in Section 13.1 When you have finished making changes, click the save button. If you do not wish to save the changes, click the cancel button. To return to the list of land inventory records, click the back button. To



delete a land inventory, click the delete button in the row of the property you would like to delete.

When not in edit mode, you can split a land inventory parcel into multiple partitions by clicking on the Split Parcel button, you can also access the appraisal information for the property by clicking on the Appraisal button to find instruction on accessing this information is detailed further in the corresponding Sections: 13.1.1 and 13.1.2, respectively.





## 9.1 Add New Land Inventory

When a parcel is closed from the Offer/Negotiations screen within Parcel (Section 7.8) and if there are remnants on the parcel the system allows the acquisition specialist to create a land Inventory record from the Close Parcel dialog and the surplus land specialist gets notified. Once the record gets created it will show up in the Land Inv screen (Section 13.0). If the record is already created for a project/parcel you do not need to create a Land Inventory record as shown below. If the parcel is not closed or the parcel is not in READS then you can use the following ways to add a new land inventory record in the system

To add a new land inventory record, click the add new button at the top of the main land Inv screen. This will allow you to add a new land property that is not associated with an existing parcel in READS. To add land that is associated with a parcel that was previously entered in READS, click the Add New using Existing parcels button the following screen will open:

The screenshot shows a web interface titled "Land Inventory". It features a filter section with the instruction "Use the following to filter the list of Projects and Parcels:". Below this are three input fields: "Responsible DOT Office" with a dropdown menu showing "Eau Claire", "Project ID" with a text input field, and "County" with a dropdown menu showing "--Select County--". To the right of these fields are "Back" and "Refresh" buttons. Below the filter section is a heading "Select the desired Parcel from the list:" followed by a table. The table has a dark blue header with columns: "Responsible DOT Office", "Project ID", "Highway", "Parcel No", "County", and "Select". The table body is currently empty. At the bottom of the interface, there is a pagination bar showing "Page 1 of 1" and a status message "No items to display".

This form is used to locate the parcel you would like to copy into the Land Inventory module. By default, the Responsible office is selected depending on which region office the logged in user is associated with it. You can enter a project id and/or a County to filter the list of parcels you want to create a land inventory from. Once the filters are entered hit the refresh button to see the list of parcels that match the criteria:



**Land Inventory**

Use the following to filter the list of Projects and Parcels:

Responsible DOT Office \*    Project ID \*    County

Eau Claire    11    --Select County--

← Back    Refresh

Select the desired Parcel from the list:

Responsible DOT Office	Project ID	Highway	Parcel No	County	Select
Eau Claire	7110-01-22	STH 85	1	Pepin	+
Eau Claire	7110-03-21	STH 37/85	1	Eau Claire	+
Eau Claire	8110-00-24	STH 64	1	St Croix	+
Eau Claire	8110-00-24	STH 64	2	St Croix	+
Eau Claire	8110-00-24	STH 64	3	St Croix	+
Eau Claire	8110-02-20	STH - 064	1	St Croix	+
Eau Claire	8110-02-20	STH - 064	2	St Croix	+
Eau Claire	8110-02-20	STH - 064	3	St Croix	+

Page 1 of 43    1 - 10 of 423 items

If a record has already been created in the system for a parcel it will not show up in the list. You can then select the parcel to copy into the land inventory module by clicking on the Select button in the row you want to copy and an alert message shows up to confirm your selection:

**Alert**

Are you sure you want to add a Land Inventory using this Parcel?

OK    Cancel

Click Ok to create the record, the project/parcel details of the original acquisition are copied from the chosen parcel including the Remnant size and remnant costs. The following screen will open:



**Inventory Details**

← Back
Split Parcel
Appraisal
Edit

Responsible DOT Office *	Project ID *	Federal ID	Classification	Type of Disposal	Received by Prop Agent	
<input type="text" value="Eau Claire"/>	<input type="text" value="7110-01-22"/>	<input type="text"/>	<input type="text" value="--Select Classification--"/>	<input type="text" value="--Select Type of Disposal--"/>	<input type="text"/>	
Parcel *	Partition	File No	Marketability	Type	Federal %	State %
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="--Select Marketability--"/>	<input type="text" value="--Select Type--"/>	<input type="text" value="0"/>	<input type="text" value="100"/>
County	Project Highway	Date Acquired	Previous Owner	County %	Local %	
<input type="text" value="Pepin"/>	<input type="text" value="STH 85"/>	<input type="text"/>	<input type="text" value="Paul Wayne"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	

Details
Sales Status
Potential Bidders
Disposition
Assignments
Payment Info
Maintenance
Documents
Diary
Log

Edit

Location/Description

WI

Characteristics	
Buildable	<input type="text" value="--Select Option--"/>
Access to Public Road	<input type="text" value="--Select Option--"/>
Improved Property	<input type="text" value="--Select Option--"/>
Contaminated	<input type="text" value="--Select Option--"/>
Maintenance	<input type="text" value="--Select Option--"/>
Other	<input type="text" value="--Select Option--"/>

County Conveyance Recvd

County Conveyance Recorded

Bid Opening

Completed Sale

Comments

Remnant Size:  Acres

Appraised Value:

Remnant Cost:  Sale Price:

If the record is copied from an existing project/parcel in acquisitions then the following fields will get filled in automatically from those screens:

Responsible DOT Office, Project ID, Parcel #, Highway, County, Taxing Unit, Tax Key Nos, Location Desc, Previous Owner, Federal Id, Funding %, Remnant Cost and Remnant Size.



To add a brand-new land inventory record that is not associated with an existing parcel, click the add new button and similar screen would open up with the difference being you have to enter all the project and parcel related data as well.

Once you have completed entering data, click the save button. This will add a new land inventory record. To return to land inventory listing, click the back button or click the cancel button



### 9.1.1 Split Parcels

If you need to create multiple land inventory records for the same parcel the only way you can do that is by splitting a parcel/land inventory record into multiple partitions by clicking on the Split Parcel button on Land Inventory details screen and the following will open:

This will allow you to split a parcel up to 4 partitions. The system requires creating at least 2 partitions for a parcel, the Enable checkboxes will already be selected for the first 2 partitions. To split a parcel into more than 2 partitions click the Enable checkbox for other 2 sections as needed. Please enter a Partition for the splits including the split of the remnant size and the cost. Once the information is entered for each partition then click on the Perform Split button, if you do not wish to split the parcel then click on the Cancel Split button. If the total remnant size and the cost of all the partitions enabled does not match with the total remnant size and the cost of the main parcel to be split then the following message pops up:

If the remnant size and cost matches then a blue inline message shows up on the top portion of the screen and will redirect you to the first partition that was created for the parcel

Once the split is completed you should be able to see multiple partitions for the same parcel in the land inventory listing screen as well.



### 9.1.2 Surplus Land Appraisals

The remnant parcels needs to be appraised again by an Appraiser and also follow the appraisal review process. The Surplus Land Appraisals works exactly the same way as regular appraisals within acquisition. You can click on the Appraisal button to enter the appraisal information for the surplus land and the following screen shows up:

Follow the instructions in Section 7.6 of this manual for completing the appraisal module.

### 9.2 Details Tab

The details tab opens by default when the user comes to the land inventory details screen. This screen includes details regarding the land inventory property. When you click on the Details tab, the following screen will open:

Characteristics	
Buildable	--Select Option--
Access to Public Road	--Select Option--
Improved Property	--Select Option--
Contaminated	--Select Option--
Maintenance	--Select Option--
Other	--Select Option--

Taxing Unit	Tax Key No	Edit	Delete
Town	Durand	004-00210-0000	[Edit] [Delete]

To enter the data on this screen, click the edit button. You can then enter the requested information. Once you are done entering or editing these fields, you can click the save button. If you do not wish to save the changes, click the cancel button.



The user should also be able to add one or more tax keys nos on this screen. The user can click on the Add New button on the top of the taxing unit/tax key nos table and the following screen will show up:

				+ Add New	
Taxing Unit		Tax Key No	Edit	Delete	
--Select Tax Unit ▾	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	
Town	Durand	004-00210-0000	<input type="checkbox"/>	<input type="checkbox"/>	

Page 1 of 1 1 - 2 of 2 items



## 9.2 Sales Status Tab

The sales status tab includes details regarding the status of a request to sell surplus land. When you click on the sales status tab, the following screen will open:

To enter the data on this screen, click the edit button. You can then enter the requested information. The left portion of the screen is for the Property Management Agent to enter data and the right side is entered by Central Office. Once you are done entering or editing these fields, you can click the save button. If you do not wish to save the changes, click the cancel button.

## 9.3 Potential Bidders Tab

The Potential allows you to track and add bid information. When you click the potential bid tab, the following screen will open:

To add a Potential Bidder, click the Add New button and the following will open:





Enter the information for the Bidder along with the address information and click the save button. If you do not wish to continue, click the cancel button. Either action will close the dialog window and return to the previous dialog window.

To edit the information for a Potential Bidder, click the edit button in the row of the desired Bidder. You will then need to click the edit button within the tab area. When you are done editing the Bidder, click the save button. If you do not wish to save the changes, click the cancel button.

You can enter multiple Potential Bidders for an Excess Land property; however, only one can be the Winning Bidder. To delete a Bidder that has been added, click the delete button in the row of the Bidder you wish to delete.

#### 9.4 Disposition Tab

The disposition tab allows you to track and add purchase agreement information. When you click the Disposition tab, the following screen will open:

To enter the date fields on this screen, click the edit button. Complete the requested information as needed. Once you are done entering or editing these fields, you can click the save button. If you do not wish to save the changes, click the cancel button.



## 9.5 Assignment Tab

When you click on the assignment tab, the following screen will open:

Role	Name	Email	Phone	Delete
Appraiser	Cheryl R. Schroeder (Becher-Hoppe Associates, Inc.)	cschroeder@becherhoppe.com	(715) 845-8000	X
Property Management Specialist	Theresa L Weil (TerraVenture Advisors, LLC (Arlington))	teri@tva-llc.com	(608) 635-4401	X
Surplus Land Specialist	Theresa L Weil (TerraVenture Advisors, LLC (Arlington))	teri@tva-llc.com	(608) 635-4401	X

The table identifies role assignments established for the project. To add a new assignment, click the Add Assignment button. To complete adding a new assignment, please see Section 7.2 for instructions on completing this form. To delete an assignment that has been added, click the delete button in the row of the assignment you wish to delete.

## 9.6 Payment Info Tab

When you click on the payment info tab, the following screen will open:

Deposit ID	Date	Check #	Check Date	Amount	Accounting Code	Payment Type	Comments	Generate Receipt	Edit	Delete
------------	------	---------	------------	--------	-----------------	--------------	----------	------------------	------	--------

To add a payment, click the add new button and the following will open:



## Payment Info Details



Deposit ID	Accounting Code *	
<input type="text" value="0"/>	<input type="text" value="--Select Accounting Code--"/>	
Amount	Date	Payment Type
<input type="text" value="0.00"/>	<input type="text" value=""/> x	<input type="text" value="--Select Payment Type--"/>
Check #	Check Date	
<input type="text" value="0"/>	<input type="text" value=""/> x	
Comments		
<input type="text"/>		

You must choose a Class Code: 9410 – R/E Sale of Land or Land Rights, 9411 – R/E Sale of Building & Personal Property, 9990 – Sales Tax, or 9666 – Miscellaneous Income. You can then enter the Date, Amount and choose the Payment Type. The choices for Payment Type will vary depending on which Class Code you choose. When you are done entering the data, click the save button. If you do not wish to enter a new Payment, click the cancel button.

You will return to the payment tab with the list of payments that have been added to the system. There is now a generate button in the “Generate Property Sales/Rental Receipt Transmittal” column to generate either this transmittal. The document will be saved in the Log (Section 13.10). If you wish to delete a payment that has been added, click the delete button in the row of the payment you wish to delete.

### 9.7 Maintenance Tab

When you click on the Maintenance Tab, the following will open:



Action	Amount	Performed On	Comments	Edit	Delete
--------	--------	--------------	----------	------	--------

This list will keep track of list of maintenance type of actions performed on this structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the delete button for the desired row in the list. To add a new entry in the table you can click on the Add New button and the following screen will open:

Maintenance Details

Save Cancel

Action \*

Comments

Amount 0.00

Performed On

You must specify the action to be performed on the structure and the amount to be spent for the action performed. Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the list.

## 9.8 Documents Tab

When you click on the documents tab, the following screen will open:

Document	Generate	Date Last Generated	Open Latest
Cultural Resource Review (RE1320)			
Land Inventory Diary (RE1047)		03/18/2013	
Order to Convey Highway Right of Way to State (RE2170)			
Quit Claim Deed State Grantor (RE1563)			
Surplus Land Sale Approval (RE2206)			



You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Microsoft Word® and will be saved in the overall Log (Section 5.0) and the Leases Log (Section 12.6). The table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.



## 9.9 Diary Tab

When you click on the diary tab, the following screen will open:

<span>Details</span> <span>Sales Status</span> <span>Potential Bidders</span> <span>Disposition</span> <span>Assignments</span> <span>Payment Info</span> <span>Maintenance</span> <span>Documents</span> <span style="background-color: #0056b3; color: white;">Diary</span> <span>Log</span>				
+ Add Diary Item				
Date	Description	Edit	Delete	
04/01/2013	Per Jim Hughes in Maintenance, do not sell this partition as it is a possible salt shed site.			
02/06/2013	Received documentation from BEES. Still need Jenny Fredrickson and Jim Hughes approval.			
02/04/2013	Received information from BEES stating a portion of it is in archeological site. Emailed Lynn Cloud at BEES to see if any portion could be sold. Email response indicated that the southern portion could be sold. No minimum distance away from site was needed.			
11/26/2012	Received okay to sell from Planning. Sent to BEES and Region for approval.			
10/01/2012	Reviewed the plat and READS to determine if surplus lands are available. There appears to be some land that could possibly be sold. Gave file to Mike Hoelker.			

To enter a diary entry, click the add diary item button and the following will open:

Details Sales Status Potential Bidders Disposition Assignments Payment Info Maintenance Documents Diary Log

Save Cancel

Communication Date \*

Subject \*

Description

Created On

Created By

Updated On

Updated By

This form is the same as in the Log, as discussed in Section 5.0. The current date will be filled in by default but can be edited if necessary. The Subject is a required field and must be entered. The Description is not required but should be entered.

Once you have completed entering data, click the save button. If you do not wish to save the data you have entered, click the cancel button. You will then return to the Diary tab listing. If you would like to edit a diary item, click the edit button in the row of the item you wish to edit and the form above will open. If you wish to delete a diary item, click the delete button in the row of the action you wish to delete.

## 9.10 Log Tab

To access the Land Inventory log, click on the Log tab. The following screen will open:

<span>Details</span> <span>Sales Status</span> <span>Potential Bidders</span> <span>Disposition</span> <span>Assignments</span> <span>Payment Info</span> <span>Maintenance</span> <span>Documents</span> <span>Diary</span> <span style="background-color: #0056b3; color: white;">Log</span>									
<span>+ Add Call Data</span> <span>+ Add Notes</span> <span>+ Add Attachment</span> <span>+ Send Email</span>									
Date	Type	Subject	View	Edit	E-Auth	Delete	Admin Delete		
07/26/2022	Document	tax map							
07/26/2022	Document	tax info							
07/26/2022	Document	plat							
07/26/2022	Document	plan							
07/26/2022	Document	pictue							

Page 1 of 4 | 1 - 5 of 20 items

Instructions on editing and adding to the Log are included in Section 5.0.





## 10.0 COMPARABLES

The Comparable module of READS is used to track all of the comparables used in the appraisal reports. To access the Acq Comps module click on Comparables on the Left Menu and the following window will open:

The screenshot shows the 'Comparables' module interface. On the left is a navigation menu with options like Project, Parcel Central, Payment Vouchers, Land Inventory, Leases, Contract, Comparables (selected), Vendor Maintenance, Acquisition Team, Region Office Setup, My Ticklers, and Reports. The main area has a search filter section with fields for Comp Sale #, County (dropdown), Property Type (dropdown), Property Area Min, and Max. Below these are fields for Sale Date From and To. There are '+ Add Comparable' and 'Refresh' buttons. The main part of the screen is a table with the following data:

Comp Sale #	Property Type	Municipality	County	Sale Price	Sale Date	Property Size	Property Size Unit	Edit	Delete
C270	Residential		Manitowoc	15,000.00	04/28/2016	0.284	Acres		
C271	Commercial	Manitowoc	Manitowoc	800,000.00	08/03/2016	6.300	Acres		
C272	Commercial	Manitowoc	Manitowoc	27,500.00	10/12/2016	0.206	Acres		
C273	Residential	Manitowoc	Manitowoc	19,500.00	10/27/2016	0.272	Acres		
C274	Residential	Manitowoc	Manitowoc	24,000.00	08/30/2016	0.328	Acres		
C275	Residential	City of Manitowoc	Manitowoc	38,000.00	03/01/2016	0.240	Acres		
C276	Commercial	City of Manitowoc	Manitowoc	392,000.00	05/05/2016	4.758	Acres		

Initially this form shows a list all of the Comparables that have been added to the database. Over time this list will grow, so at the top of the form there are different filters that can be applied to show only the ones you are interested in. You can use as many of the filters as necessary. After entering your selections, click the refresh button. This list will then show only the comparable that apply to your selection.

To view and/or edit the details for a particular Comparable, click the edit button in the row of the desired comparable. You would then click the edit button at the top of the screen to make any changes. You can follow the instructions in the following section for editing a comparable. To delete a Comparable, click the delete button in the row of the comparable that you wish to delete.

### 10.1 Add New Comparable

To add a new comparable click the button and the following will open:

The screenshot shows the 'Add New Comparable' form. It has a 'Save' button and a 'Cancel' button at the top right. The form contains several fields: Comp Sale # (text input), Property Type \* (dropdown), Legal Description \* (text input), and Conveyance Date (calendar icon). Below these are Location (text input), County (dropdown), Property Area (text input with value 0.000), and Verified By (text input). Further down are Tax ID (text input), Municipality (text input), Present Use (text input), Unit Price (text input with value 0.00), and Verified To (text input). At the bottom are Entered By (text input), Zoning (text input), Sale Price (text input with value 0.00), Confirmed Price (text input with value 0.00), and Verified Date (calendar icon).

The Comparable Sale # and Property Type are required fields and must be entered. The Sale Price is automatically calculated by the system.





When you have finished entering all available data, click the save button. If you do not wish to save the comparable, click the cancel button. To return to the list of Comparable, click the back button.



Once you have saved the comparable, several buttons will then appear on the screen as shown below:

The screenshot shows the 'Comparables' form with the following data:

Comp Sale #	Property Type *	Legal Description *	Conveyance Date
C271	Commercial	All of Parcel 052-826-403-115.00 in the City of Ma	08/03/2016
Location	County	Property Area	Verified By
Vacant Land, Expo Drive	Manitowoc	6.300 Acres	Rich Otradovec
Tax ID	Municipality	Present Use	Unit Price
052-926-403-115.00	Manitowoc	Clinic	126,984.13
Entered By	Zoning	Sale Price	Confirmed Price
Mitchell Burki	Light Industrial	800,000.00	800,000.00
			Verified Date
			01/05/2017

The 'Additional Info' tab is active, showing the following fields:

Date Inspected	Highest & Best Use	Neighborhood	Land Quality	Waterfront	Improvement
				--Select Waterfront--	--Select Improvement--
Intended Use	DOM	Topography	Utilities	Easement, Encumbrances, Restrictions	
Health Clinic					
Condition of Sale	Financing	Road Frontage	Site Description	Comments	
Arm's Length				Rich Otradovec researched the area on behalf of St. Vincent's to locate a site for a new clinic. Rich worked	

This is the same screen you would see when you click on the edit/view button in the Comparables list shown in the outer main Comparables form.

### 10.2 Additional Info tab

By default this tab will open up when the user comes to the Comparable Details screen. When users click on the following will open:

This screenshot is identical to the one above, showing the 'Additional Info' tab with the same data and field layout.

### 10.3 Documents Tab

When you click on the documents tab, the following screen will open:



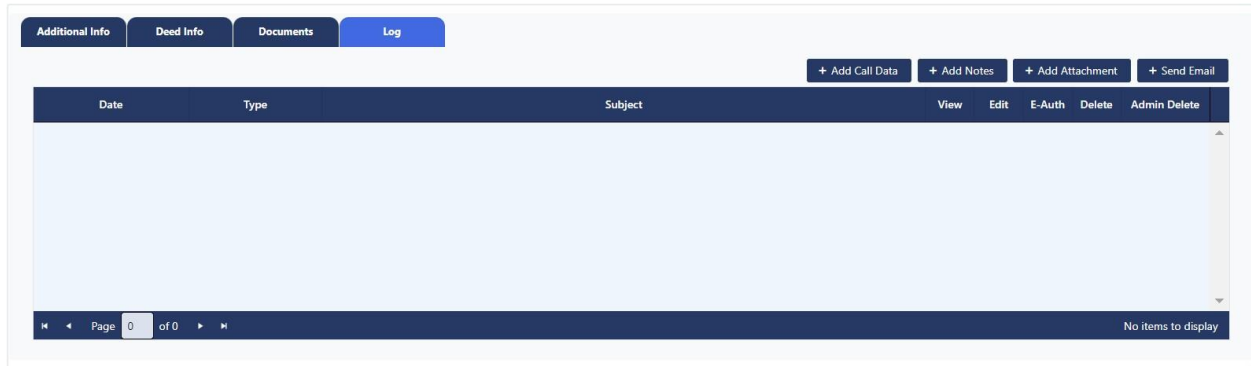
Document	Generate	Date Last Generated	Open Latest
Comparable Sale Sheet (RE1011)		10/24/2018	

You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Leases Log (Section 12.6). The table will be updated with the newly generated document date last generated. To open the latest document created, click on the open button in the row of the document you wish to open.



## 10.4 Log Tab

To access the Comparables log, click on the Log tab. The following screen will open:



Instructions on editing and adding to the Log are included in Section 5.0.



## 11.0 E-HELP

E-Help is used to notify the system administrator and support and maintenance team of any problems, questions or recommendations that you may have with the system. When you click on e-Help on the Top Menu, the following window will open:

The screenshot shows a web form titled "E-Helps" with a close button in the top right corner. The form contains the following fields and controls:

- Type \***: A dropdown menu with "Select" as the current value.
- Urgency \***: A dropdown menu with "Select" as the current value.
- Module \***: A dropdown menu with "Select" as the current value.
- Attach**: A button labeled "Select files..." for uploading attachments.
- Summary \***: A single-line text input field.
- Message \***: A multi-line text input field.
- Buttons**: "Send" and "Cancel" buttons at the bottom left.

You must choose a Type, an Urgency, and a Module. The module dropdown will include all modules within the database. If you cannot find an appropriate module or your Bug, Issue, Question or Recommendation is generic, you can choose Other. Finally, type your message in the Message field. You should be as specific as possible with your message. Include the project, parcel, screen, etc. that you are having an issue with or have a question or recommendation for. When you have completed entering your message, click the send button. If you do not want to send an e-Help, click the cancel button.