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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

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.

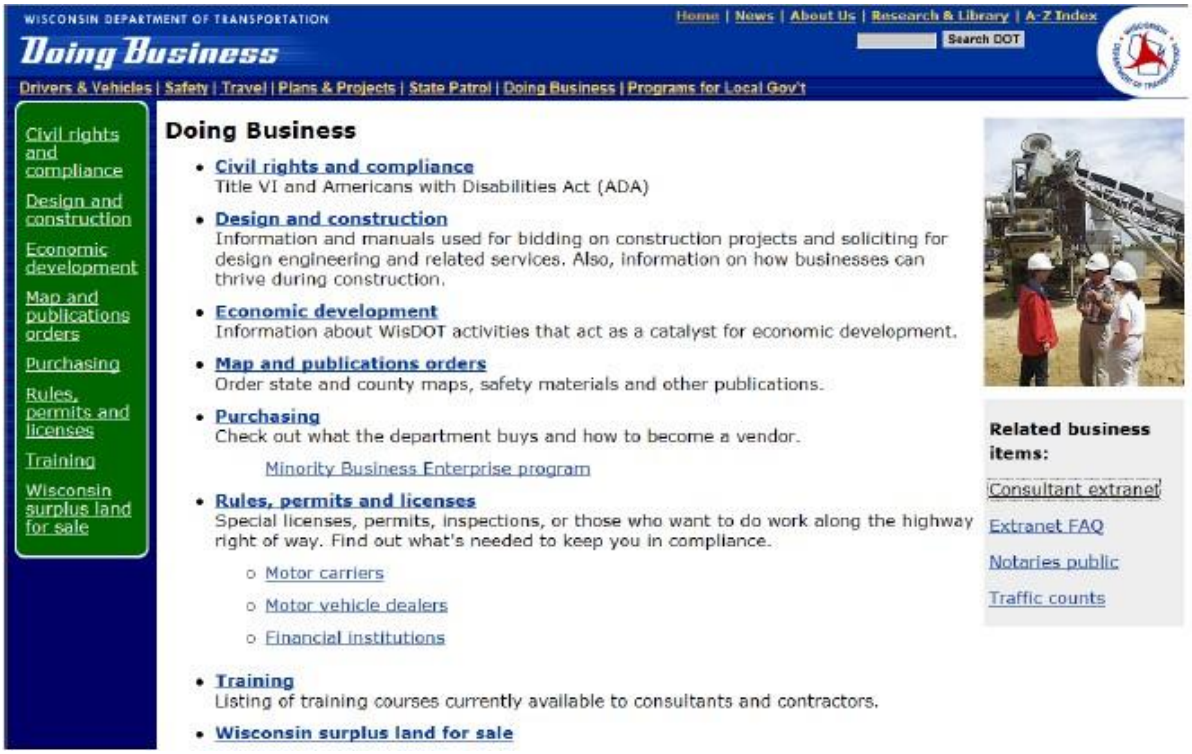
If you are a DOT Consultant then you should click on the Consultant button and will require your My Wisconsin username and password.

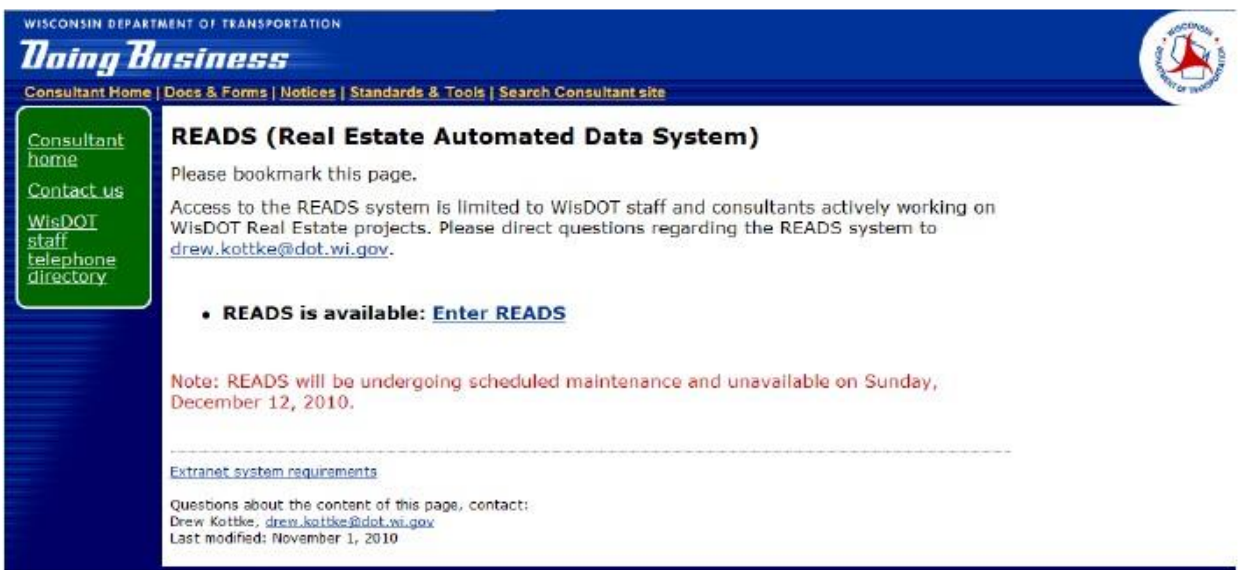
You can also access the READS application through the READS launch page below:

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

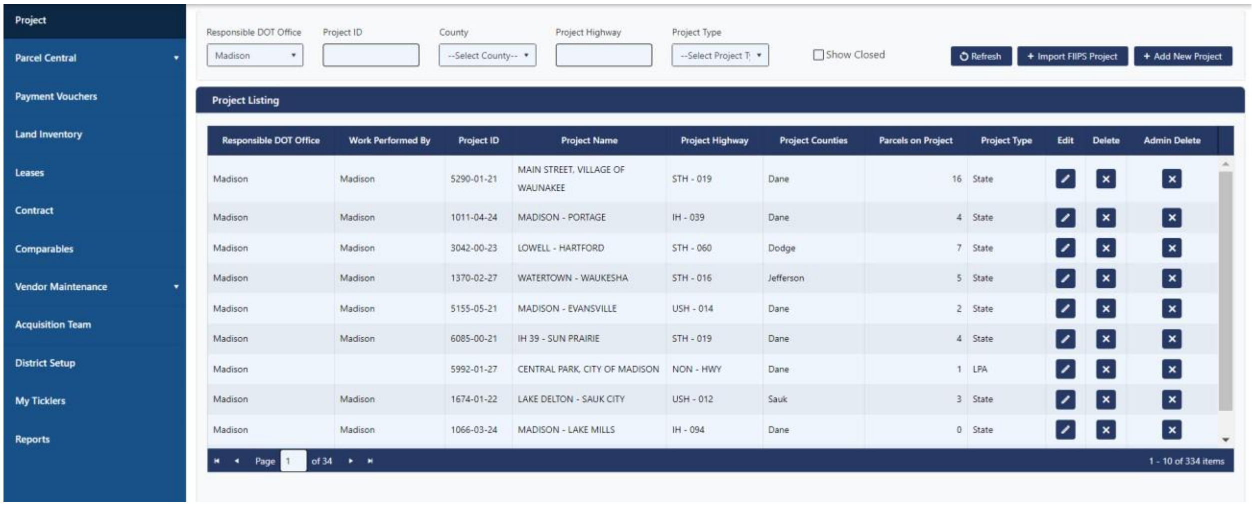
Access the READS Launch page via the Consultant Extranet



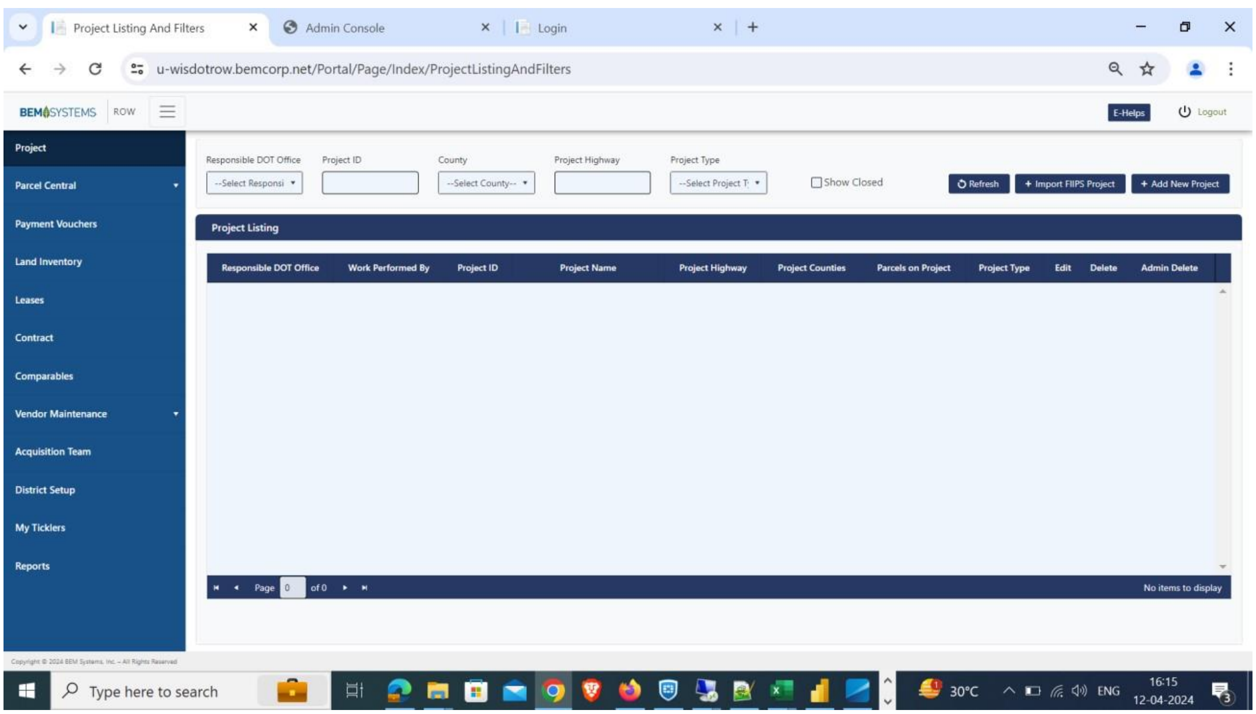


A MyWisconsin ID and password for consultants and a Azure AD username and password are required to access READS, which is issued by Wisconsin Department of Transportation. Once logged in and the following screen will open:

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



For Consultant Users:



3.0 MENUS AND BUTTONS

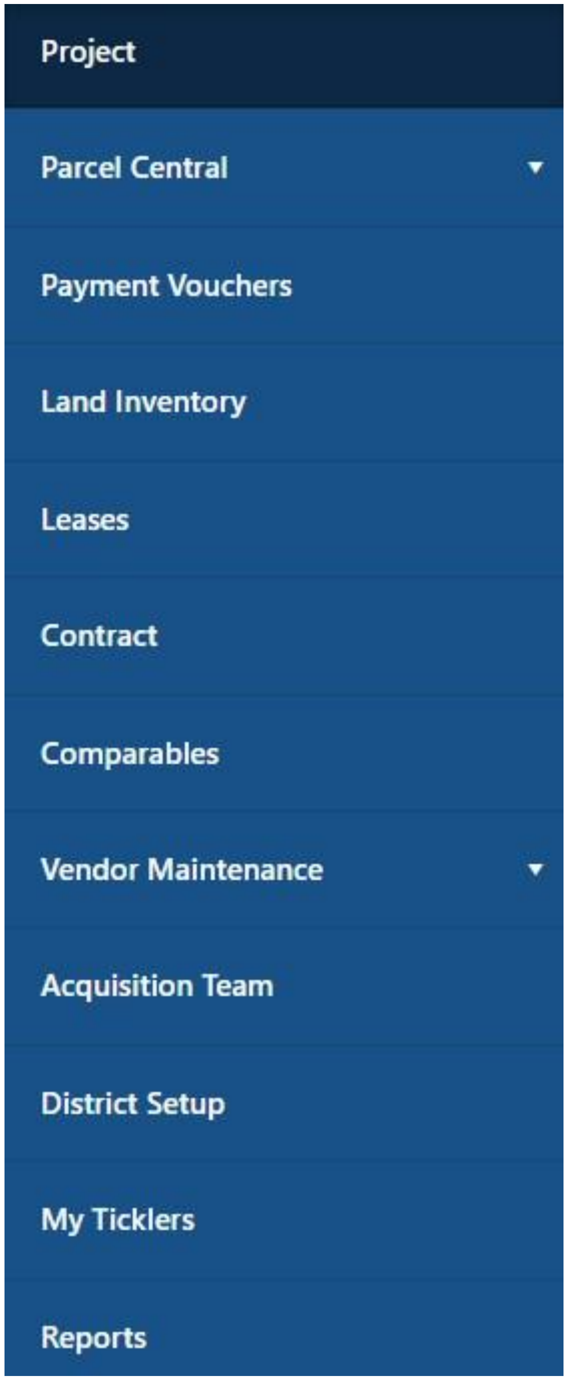
This section provides brief descriptions of each command on the READS™ main menus and buttons. Where appropriate, it provides references to other sections of the manual for more information.

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

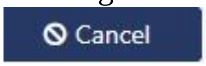
There are several features of READS that are the same throughout the program. These features include Edit/Save/Cancel/Print functionality, attaching documents, e-mailing documents, and generating documents. The following sections outline how to use these different features.

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

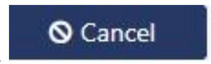
READS requires data entry and updating to be performed while in "Edit Mode". Select the edit button to enter into edit mode. This feature is a safeguard to prevent accidental overwriting of data. When you click the edit button, this enables the fields of the form that you are working on and disables 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 

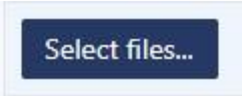
on a screen, but do not want to make changes or save the changes you have made, click the cancel button 

to enable the menu items and go to a different screen.

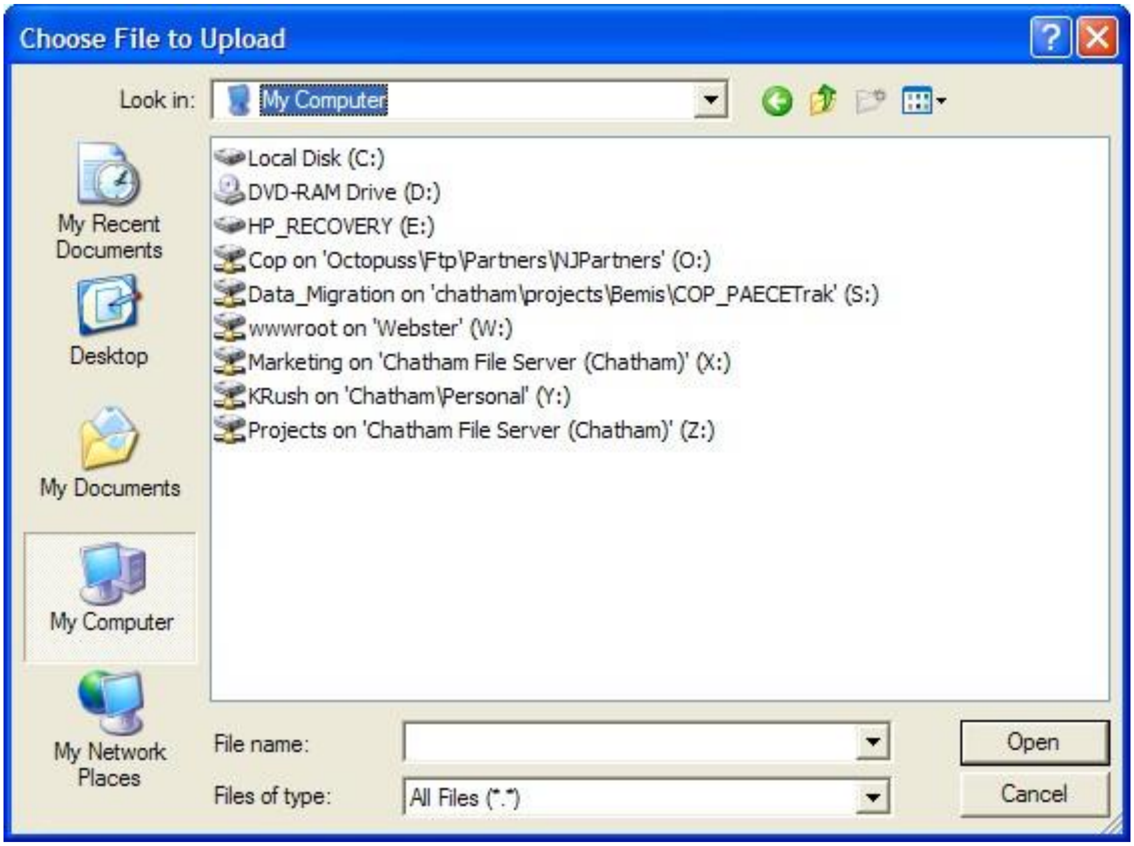
4.2 Attaching Documents

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:

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

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



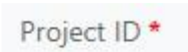
Once you have located the desired file, you can double click on it, or click once and then click on the Open 

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: 

5.0 LOG

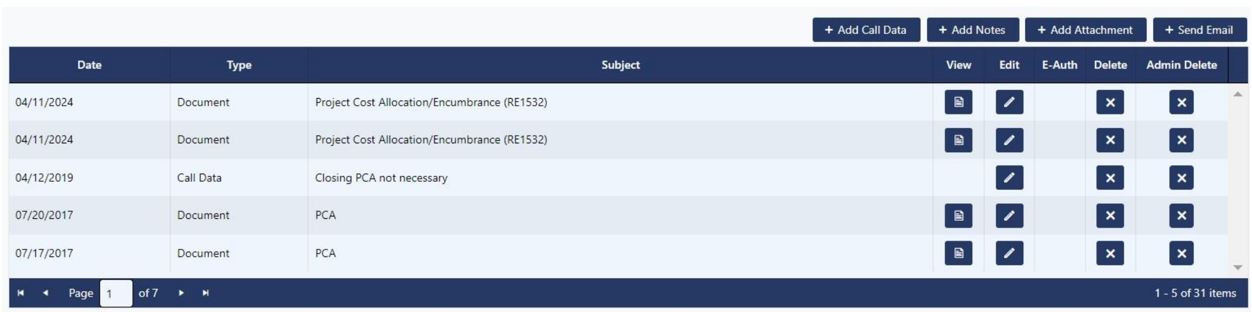
This section provides instructions on how to use the Log. The Log is found throughout the

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

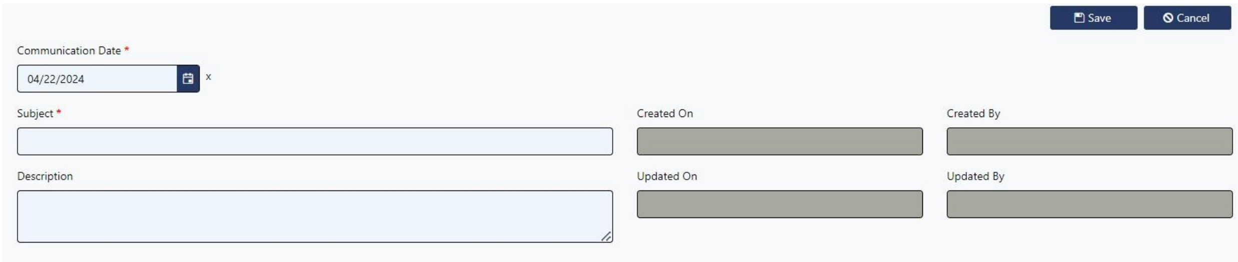
There can be many entries in the Log. To page through the Log you would use the arrow buttons located at the bottom of the form.

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:

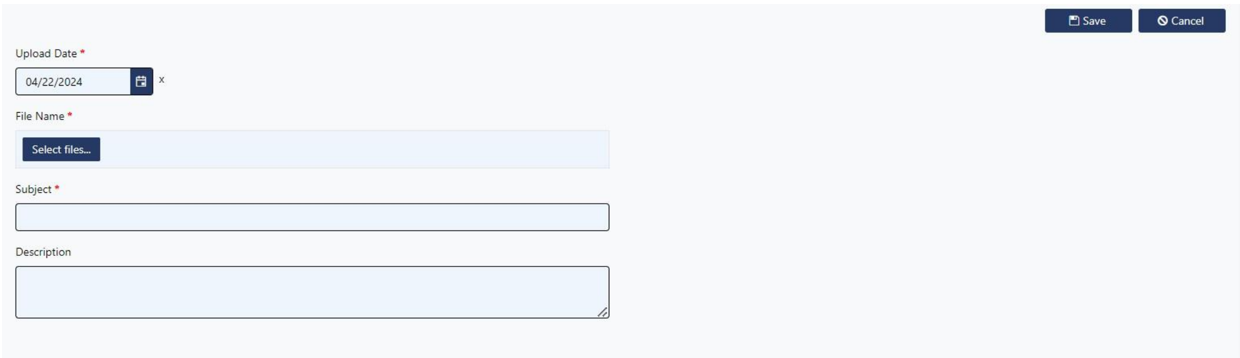


The current date will be filled in by default but can be edited if necessary. The Subject is a required field and must be entered. The Description is not required but should be entered.

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.

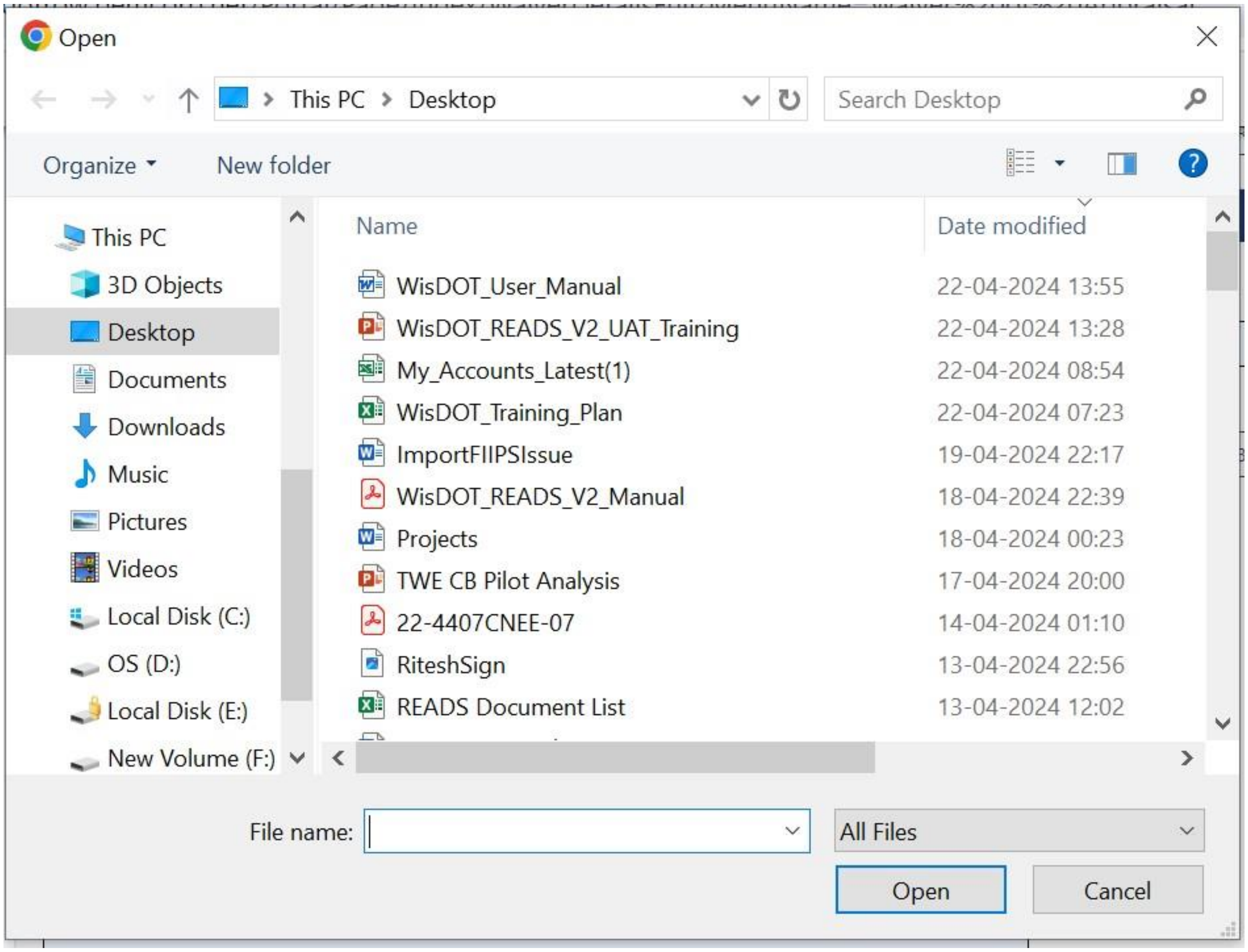
5.2 Attaching Documents

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 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:

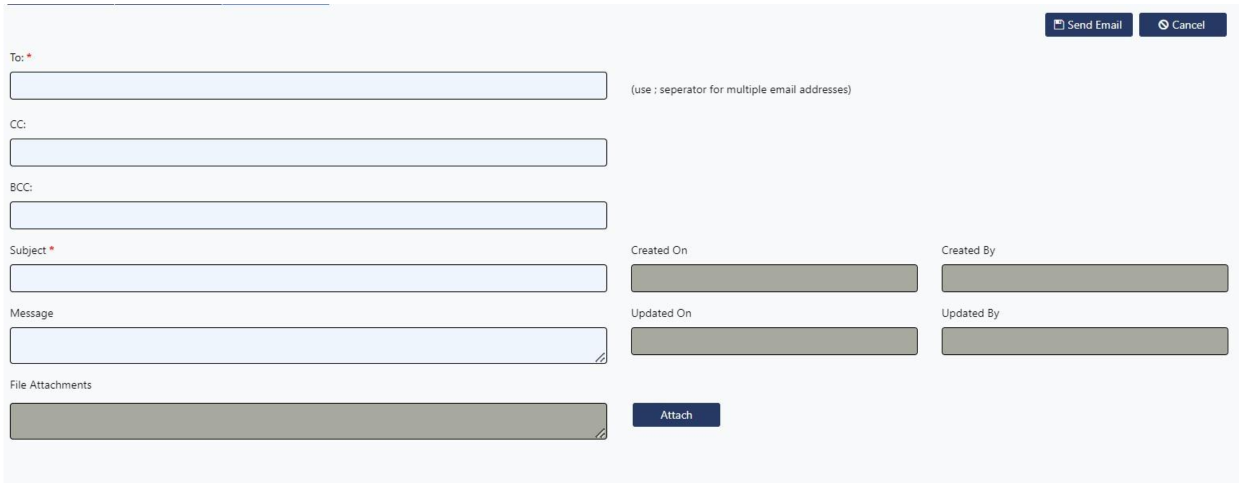


Once you have located the desired file, you can double click on it, or click once and then click on the Open button . This will then place the file's name and path in Document textbox. Once you have completed entering the required information and are ready to upload and attach the file, click on the 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



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.

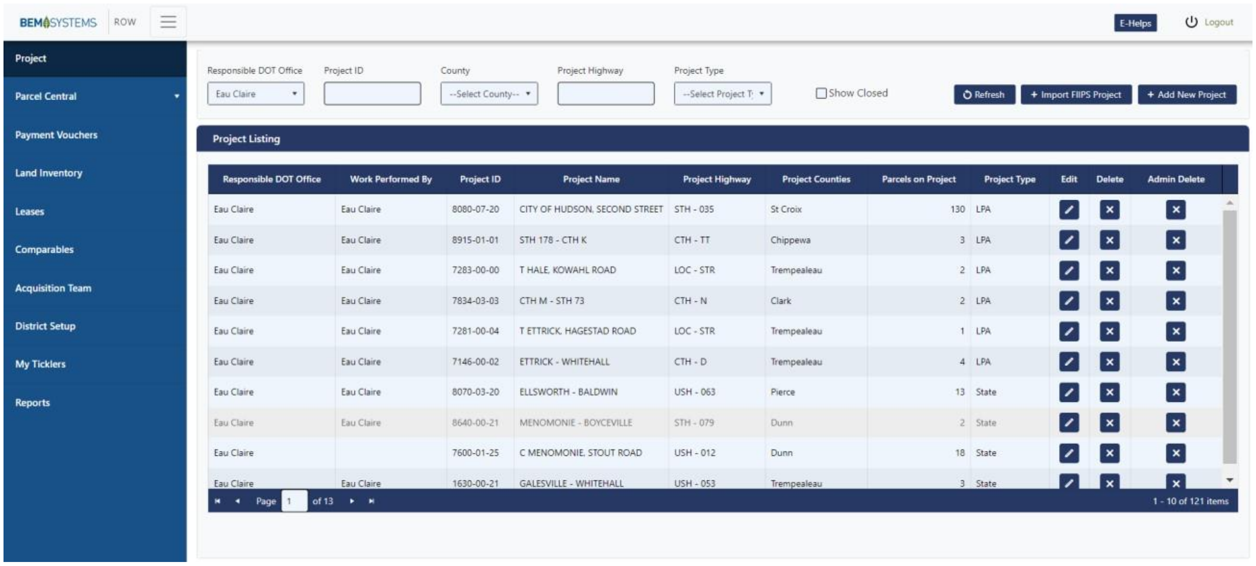
Next, click the send email button and follow the instructions above for sending emails. You will notice that there are now files listed in the File Attachments field:

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.

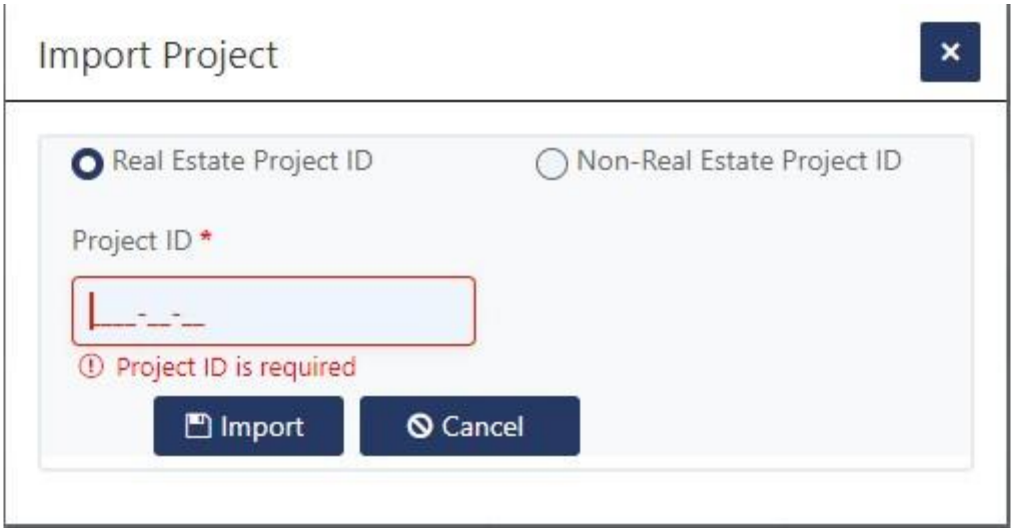
Adding a new State Project:

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:

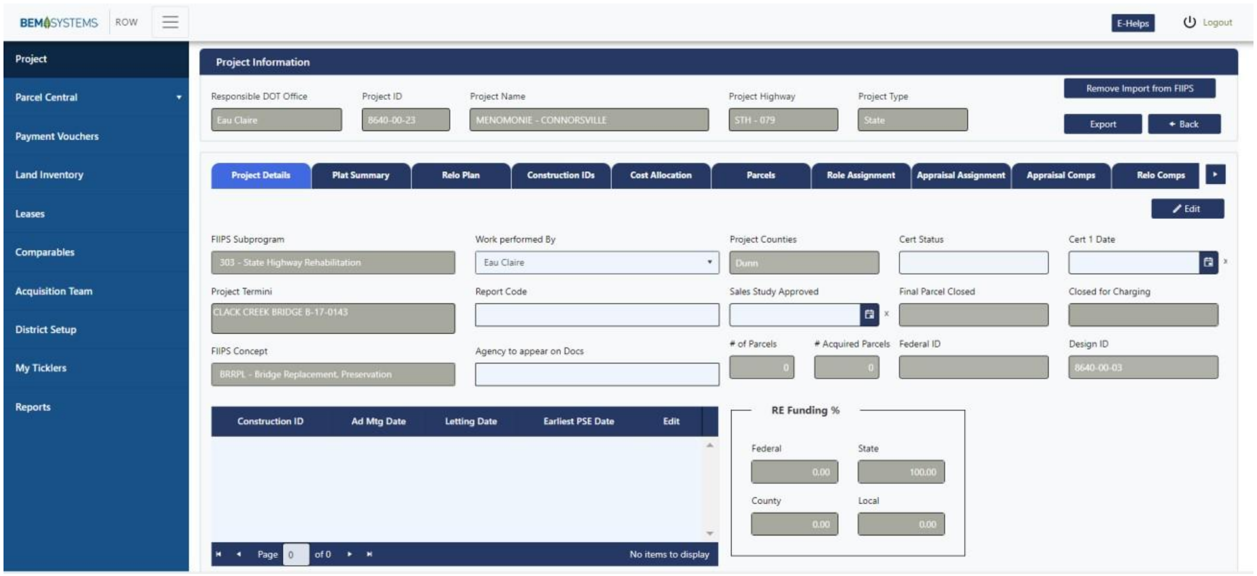


c. Select the option based on whether you want to import the real estate or non real estate project.

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:

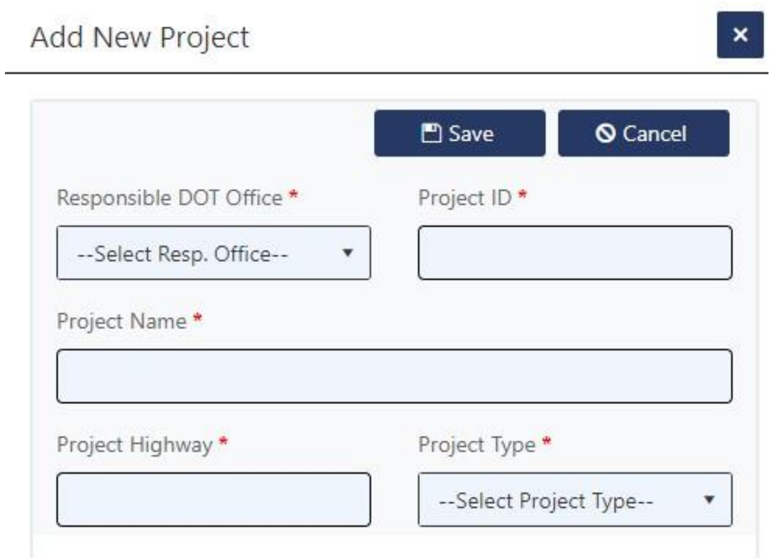
If you enter a Project ID which is not in FIIPS the following message will show up:

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



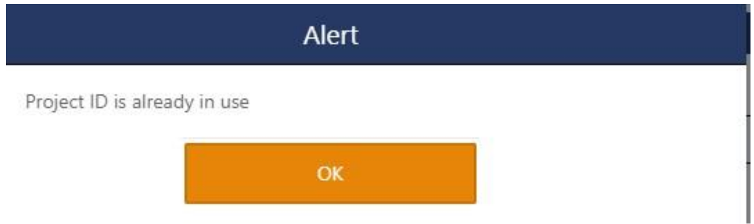
2. Add New State Project (Not in FIIPS)

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



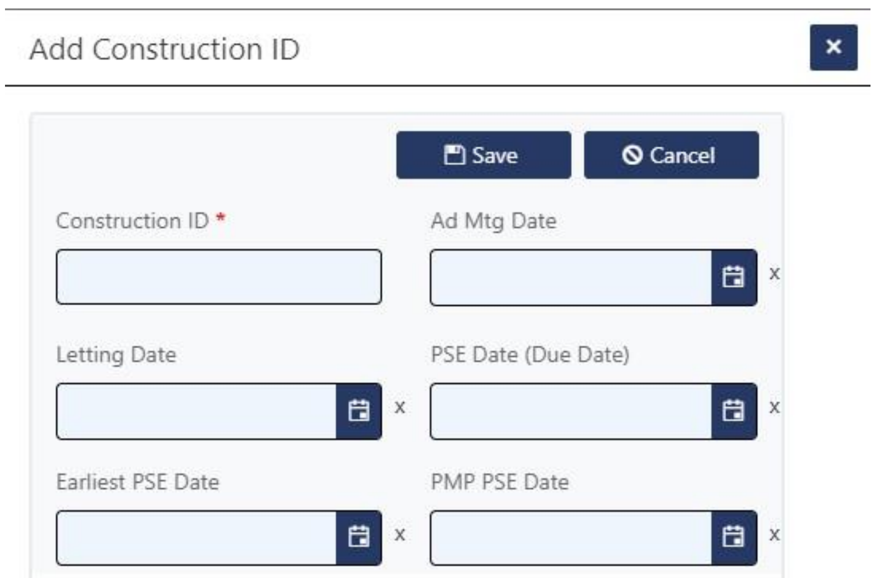
In order to create the project, you must enter the Project ID, Project Name, choose the Responsible DOT Office, enter the highway and Project Tye.

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

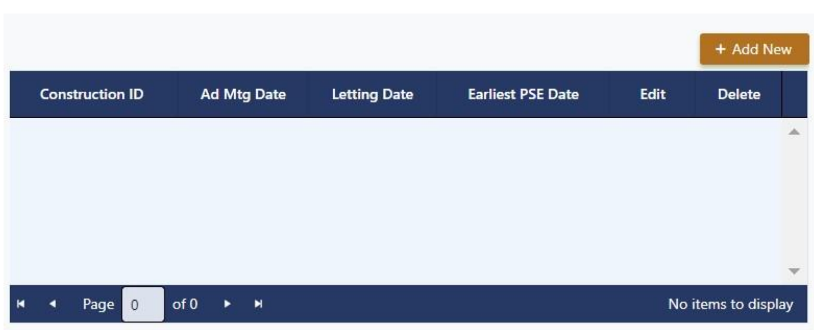


Click the save button to add the project and the screen will refresh to show the data entered by the user. Construction ID related data will only be entered once the basic information about the Project has been added to the system.

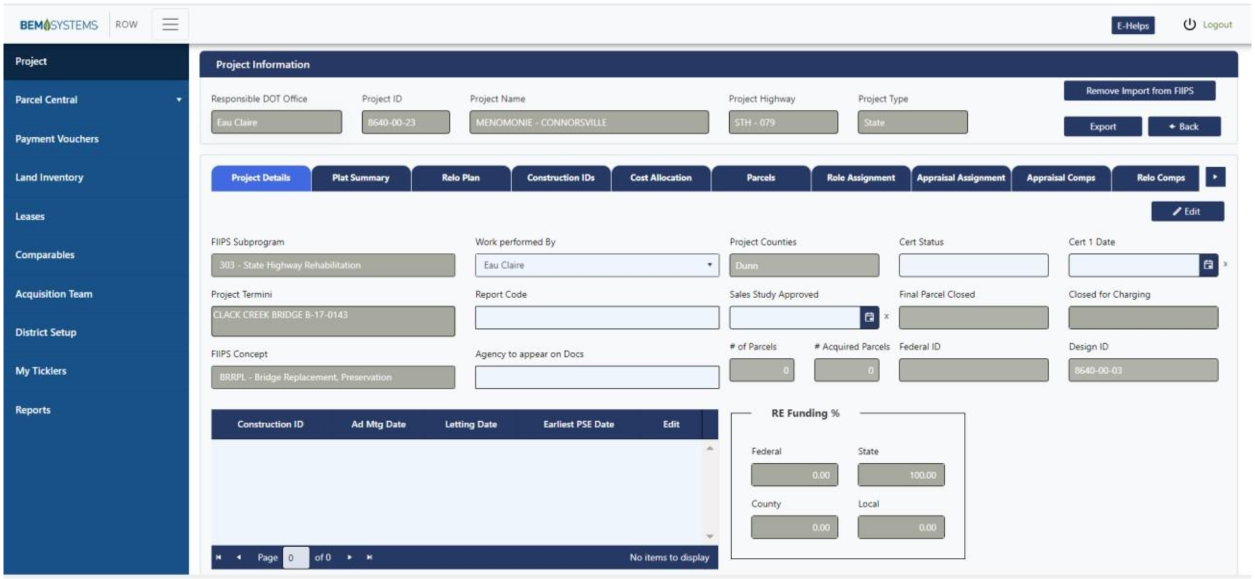
In order to add Construction IDs and the letting dates click Add New next to the Construction IDs section and the following screen will pop up:



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 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

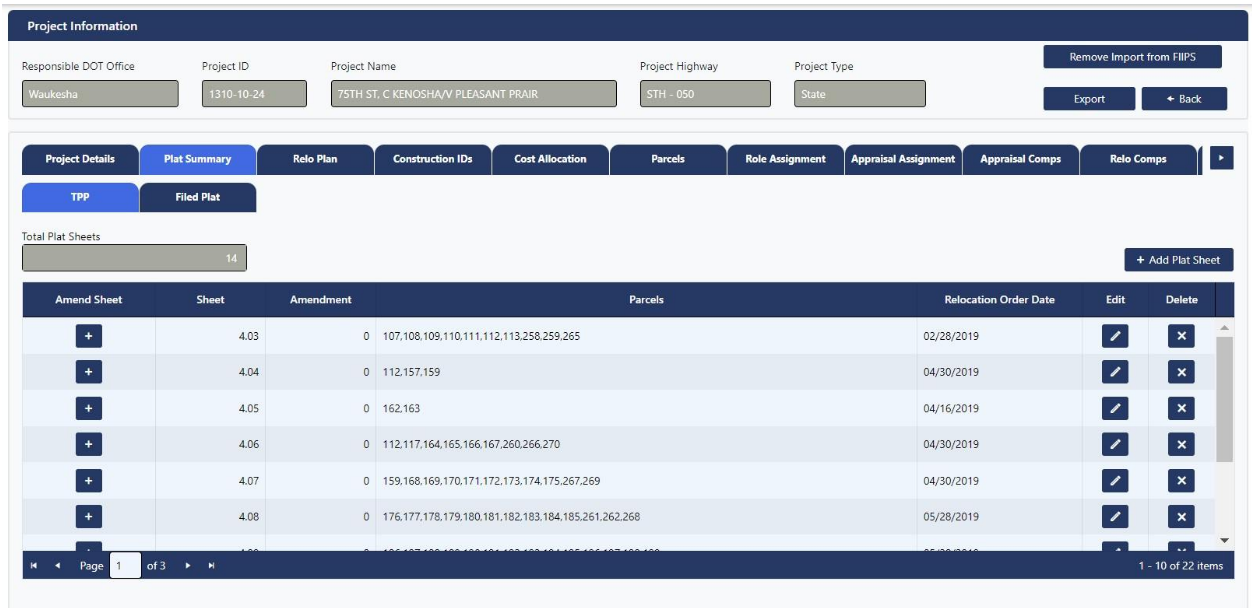
Construction IDs

PSE Dates (PSE Date, Earliest PSE Date and PMP PSE Date)

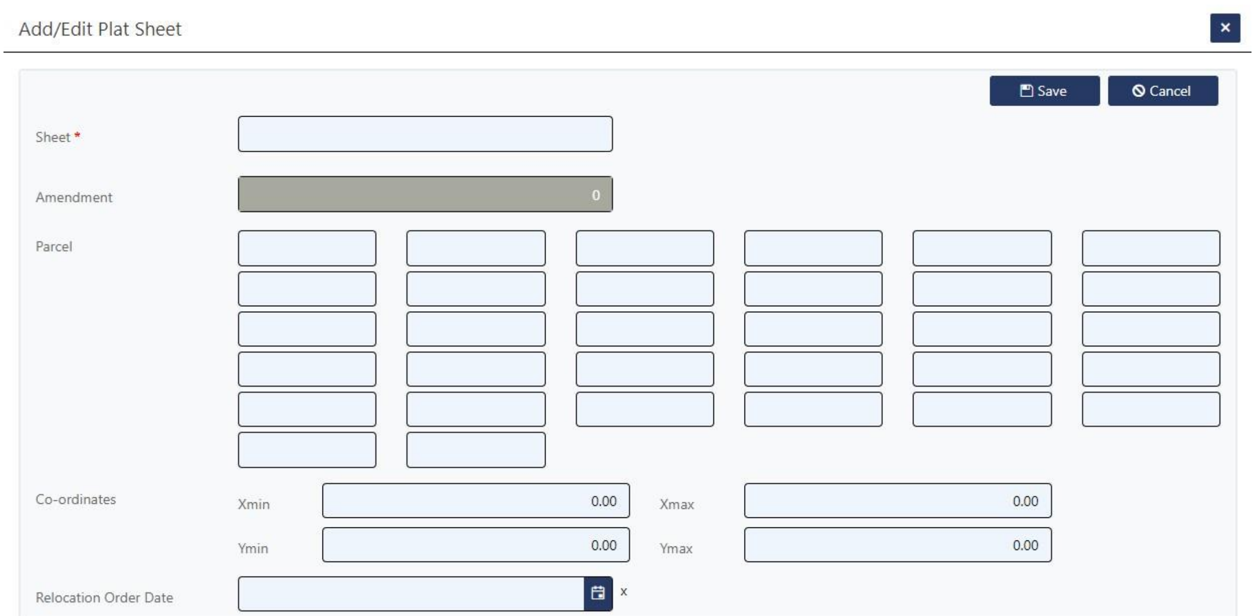
The READS system will get updated by a nightly batch process from FIIPS in order to show the latest project information in READS from the FIIPS system.

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:



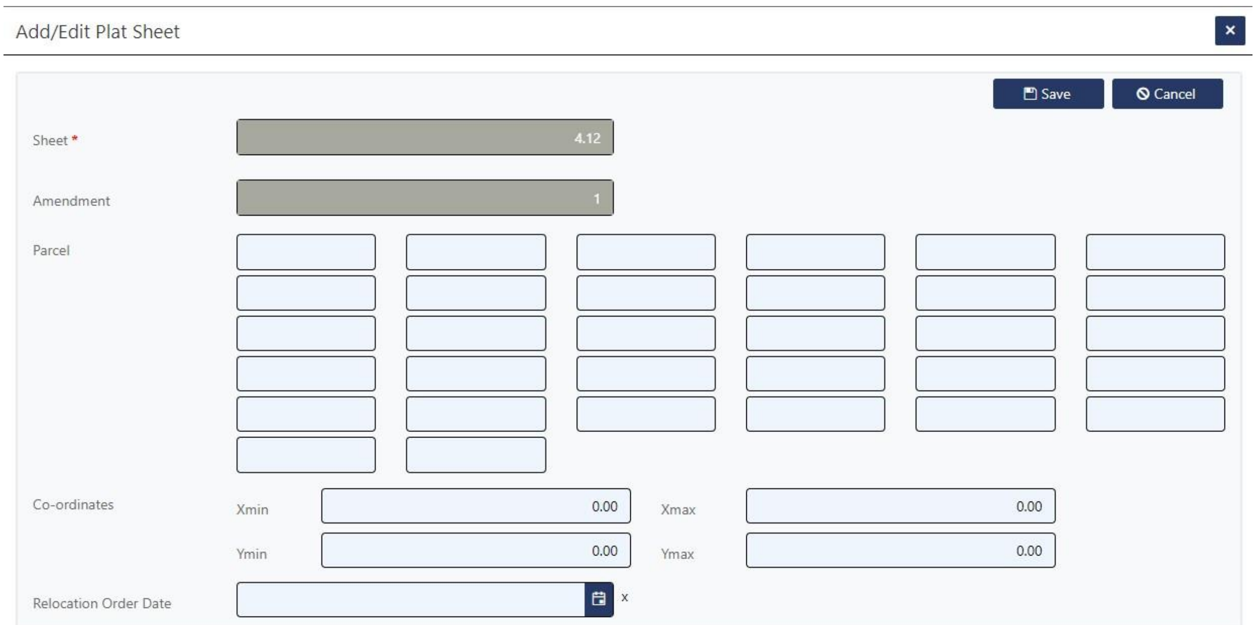
Click on Add Plat Sheet in order to add a new TPP plat sheet and the following popup will open up:



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:

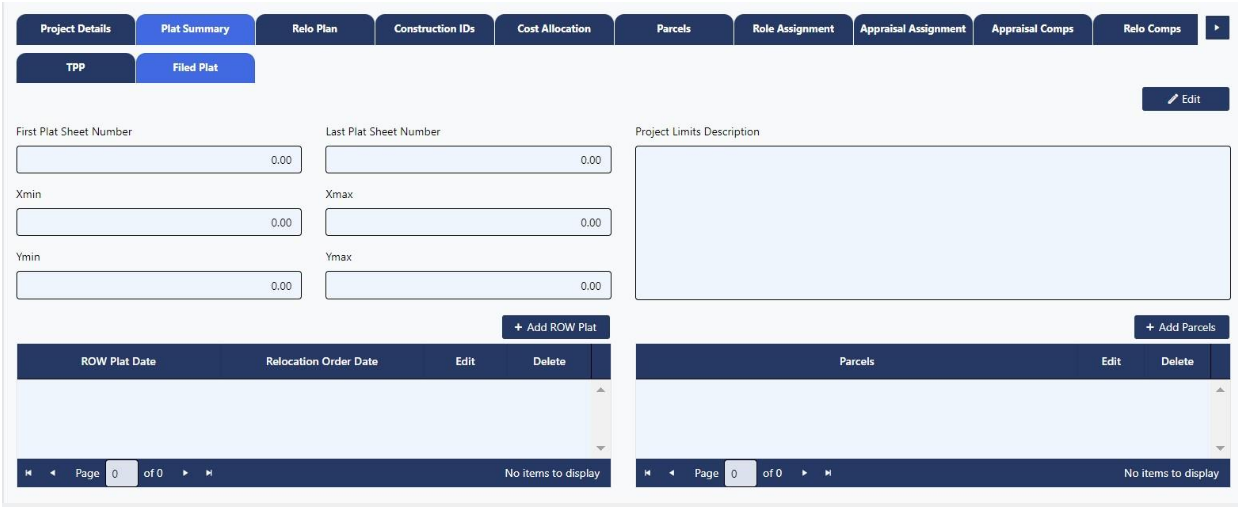


To view the details of a TPP plat sheet, click the edit button in the row of the plat sheet.

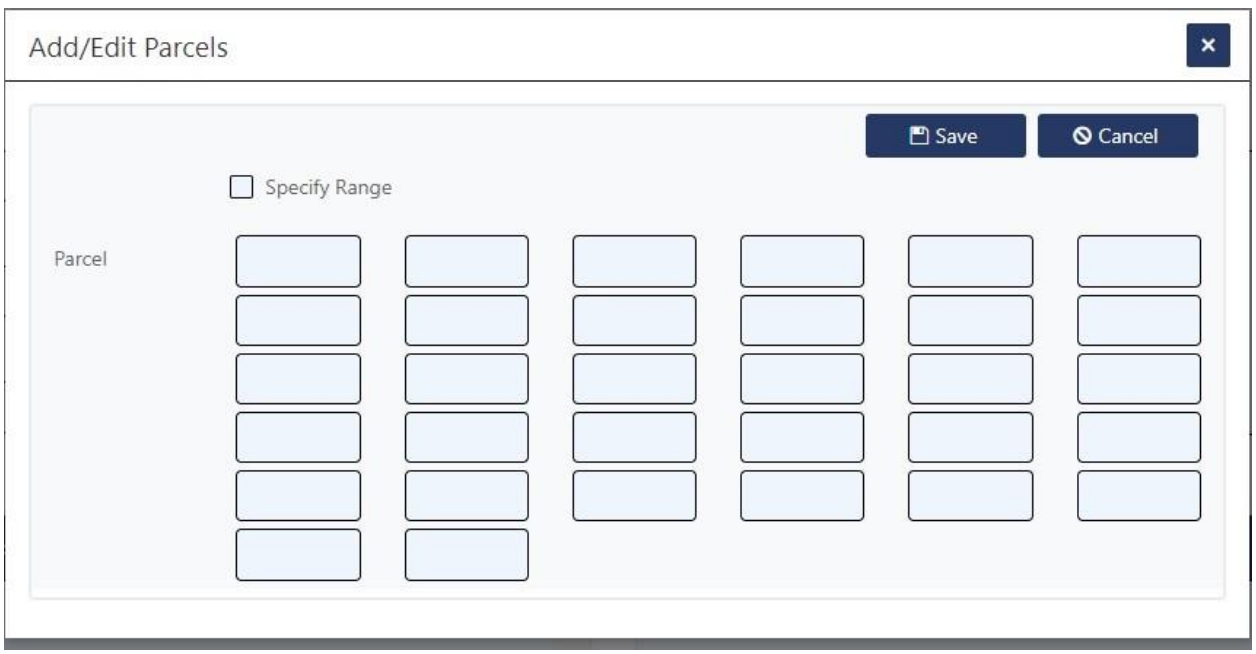
To delete a plat sheet, you click the delete button in the delete column.

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:

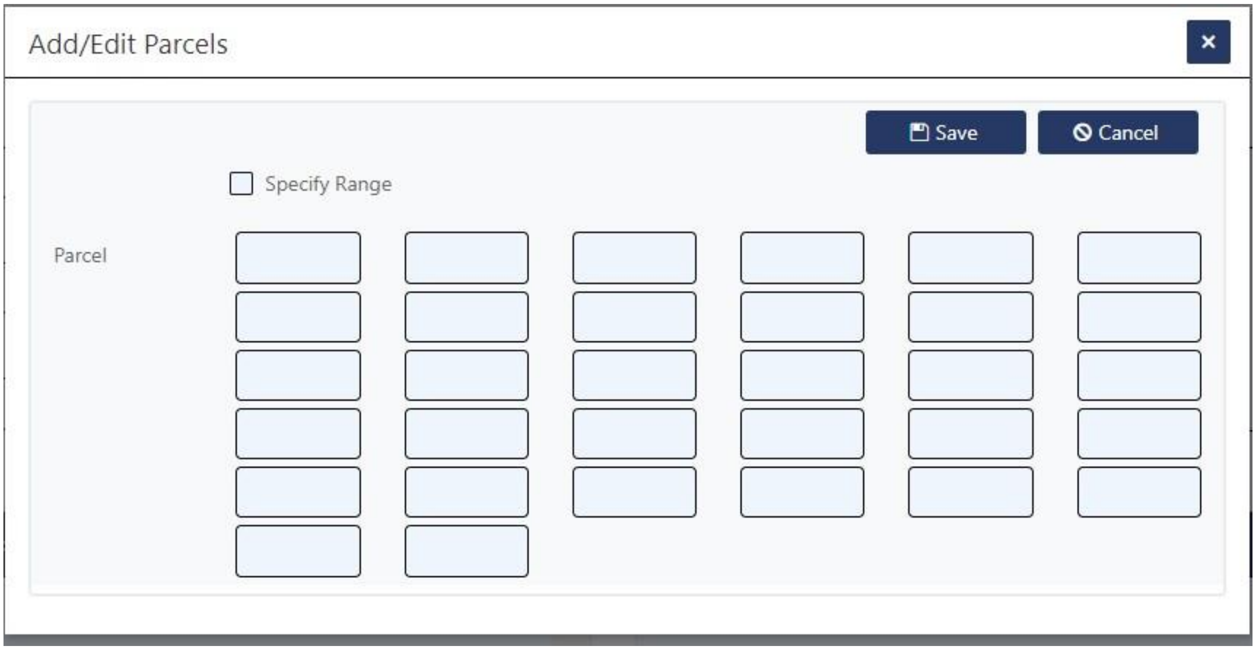


In order to add parcels to the filed plat click on the Add Parcels button and the following screen will show up:



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



Range of Parcels

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.

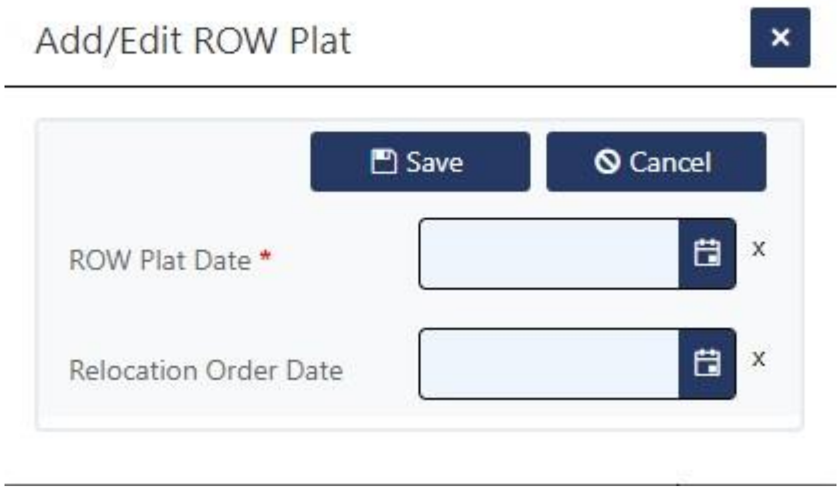
You can click on the edit button in the table to edit any of the parcels entered for the filed plat.

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:

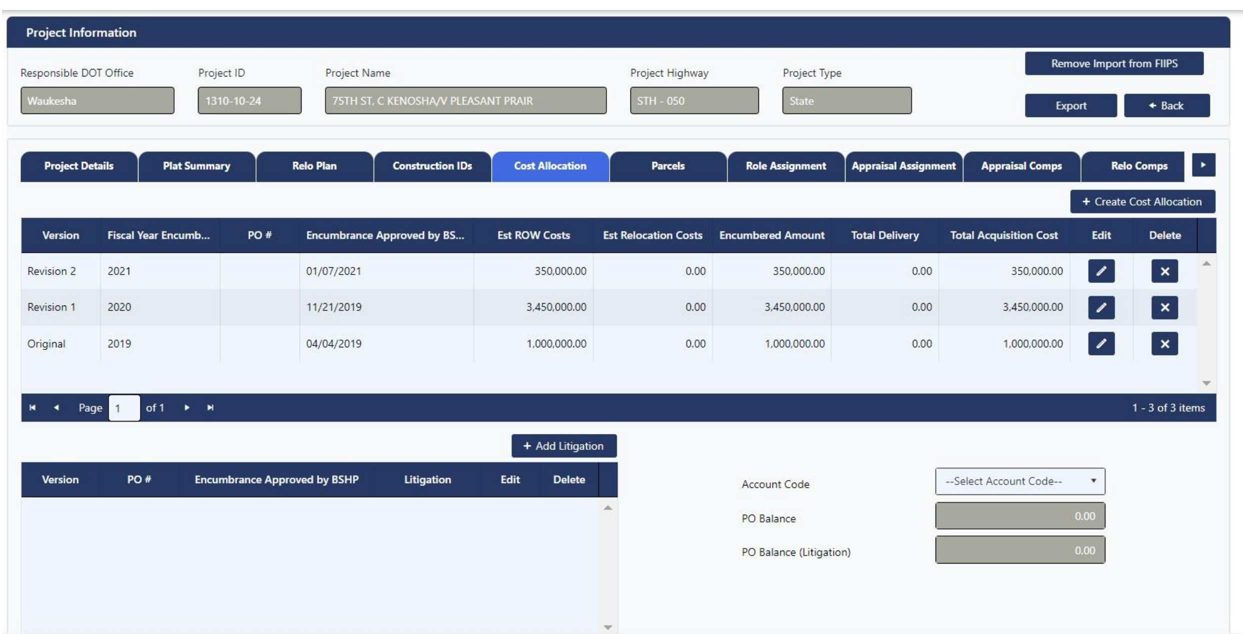


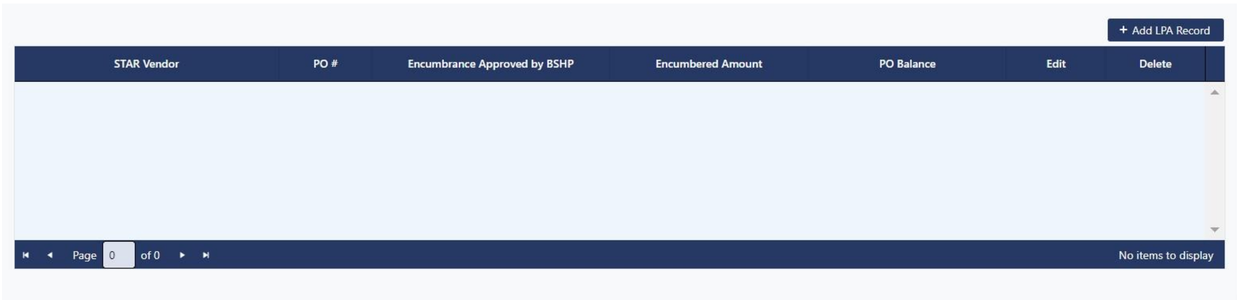
You must enter a ROW Plat Date in order save the information on the screen.

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

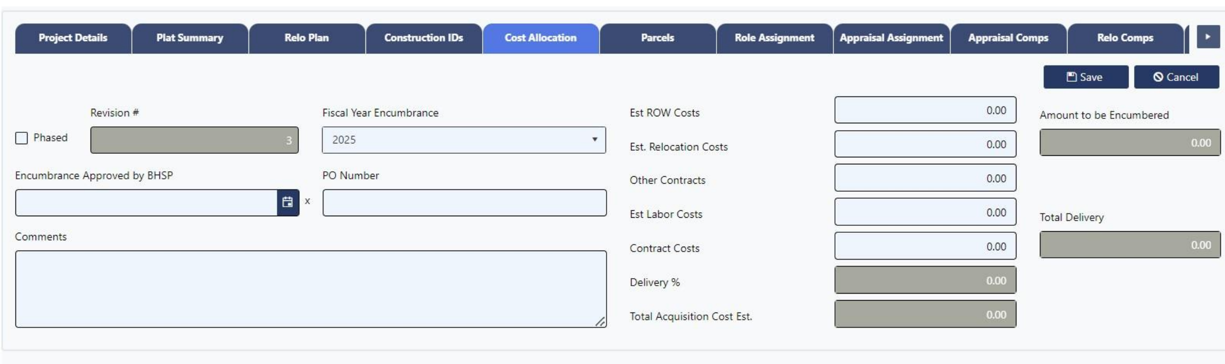
When you click on the Cost Allocation Tab the following screen will show up:





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:



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:

+ Create Cost Allocation

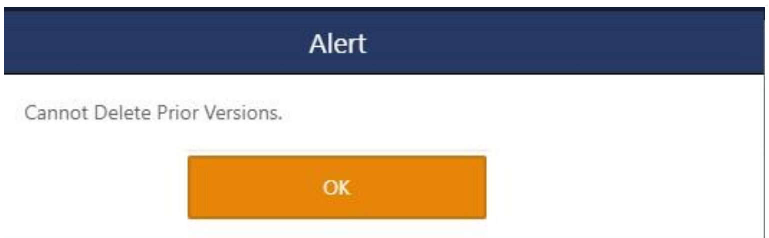
Version	Fiscal Year Encumb...	PO #	Encumbrance Approved by BS...	Est ROW Costs	Est Relocation Costs	Encumbered Amount	Total Delivery	Total Acquisition Cost	Edit	Delete
Revision 2	2021		01/07/2021	350,000.00	0.00	350,000.00	0.00	350,000.00		
Revision 1	2020		11/21/2019	3,450,000.00	0.00	3,450,000.00	0.00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

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.

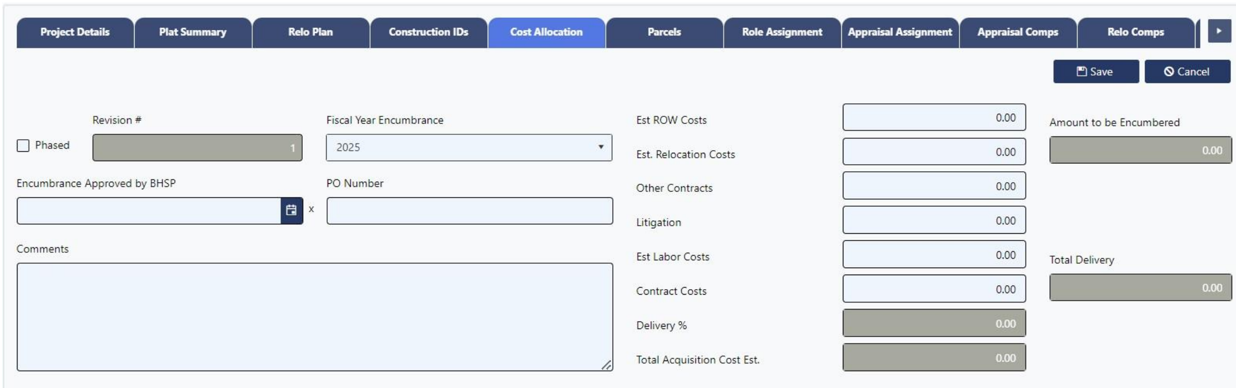
This screen also shows list of cost allocation records for Litigation as below:

+ Add Litigation

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

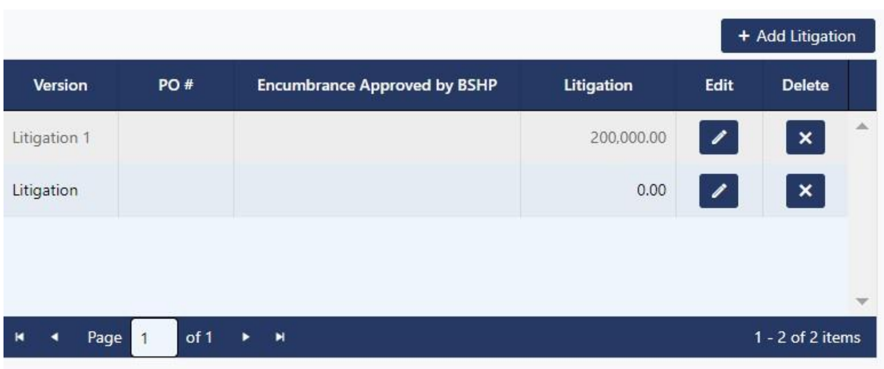
Page 1 of 1 — 1 - 1 of 1 items

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

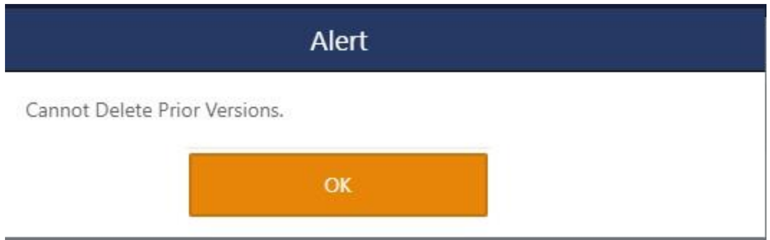
Version	PO #	Encumbrance Approved by BSHP	Litigation	Edit	Delete
Litigation 1			200,000.00		
Litigation			0.00		

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:

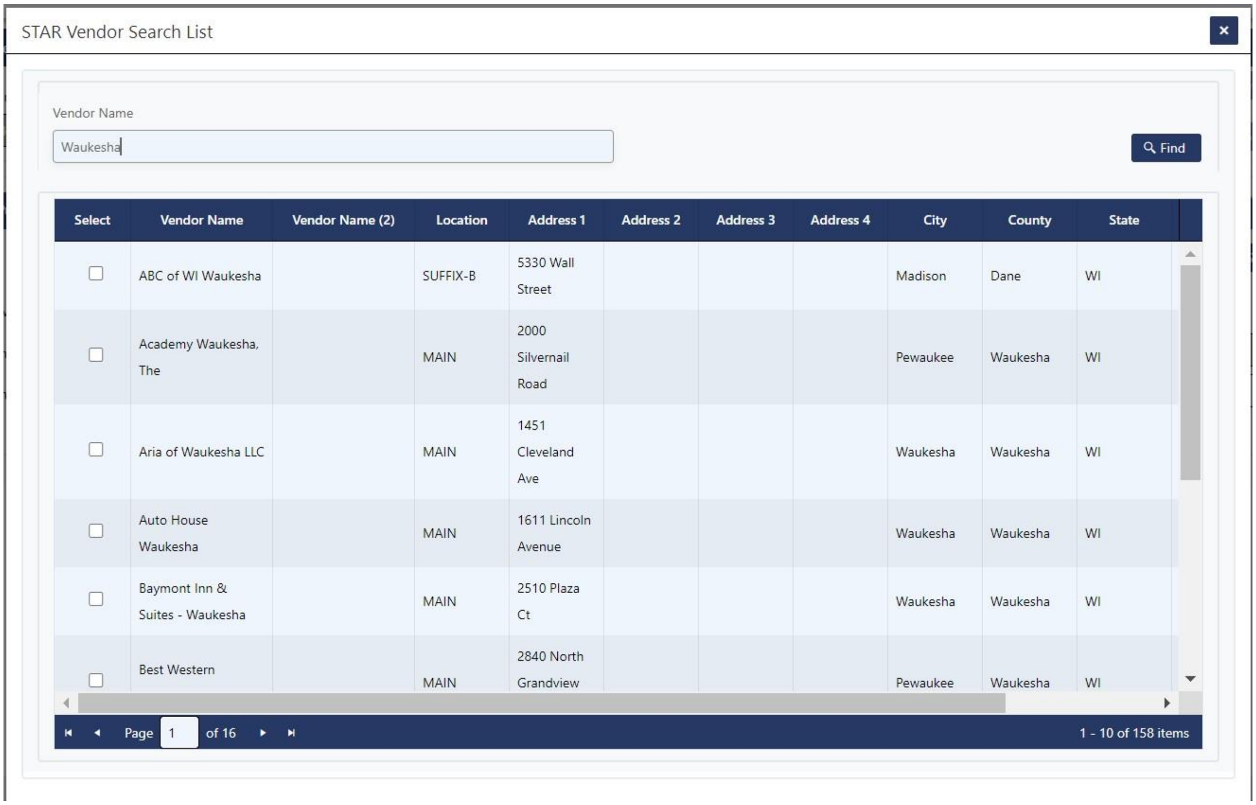


The users can also generate the Real Estate Cost Allocation/Encumbrance record from this tab.

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

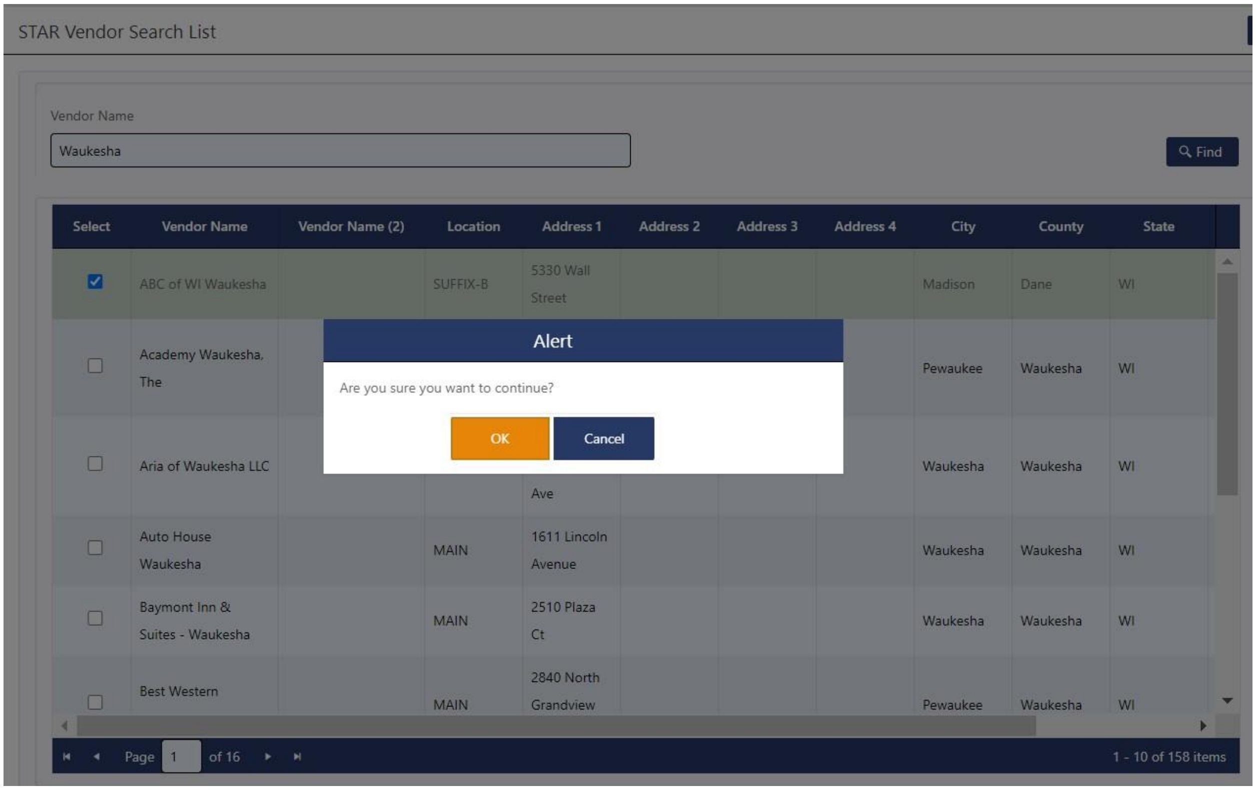
Click on Add LPA record to add a new cost allocation record:

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:



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

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

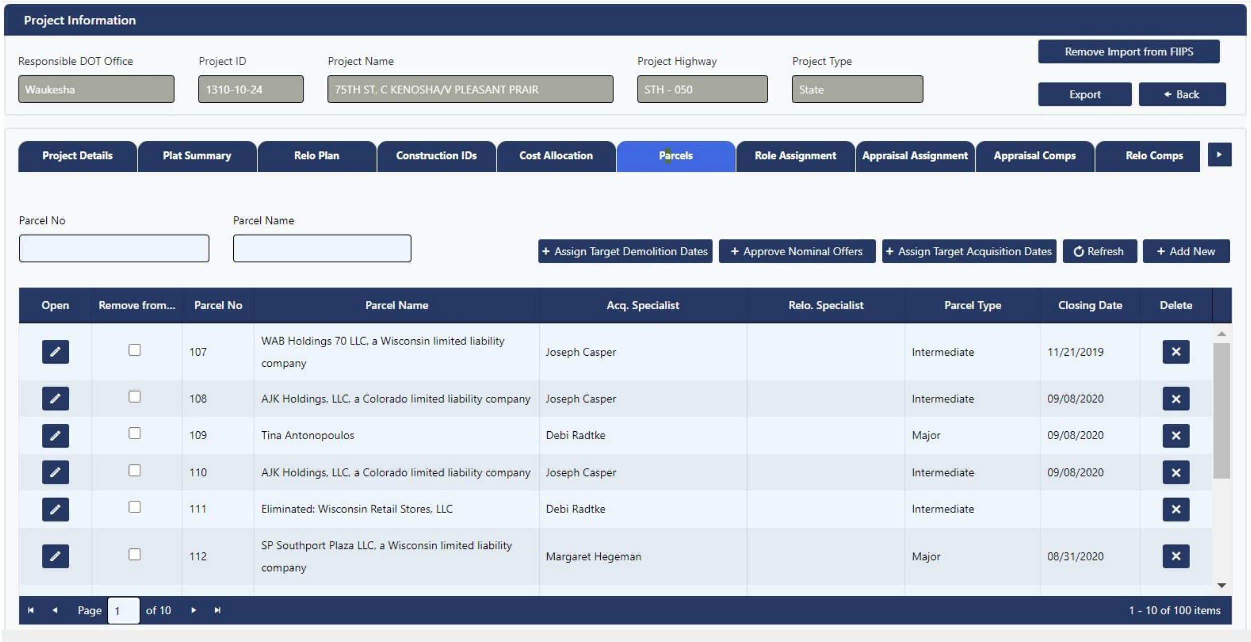


You can click on the edit button in the table to view/edit any of the cost allocation records for LPA's entered for the project.

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:



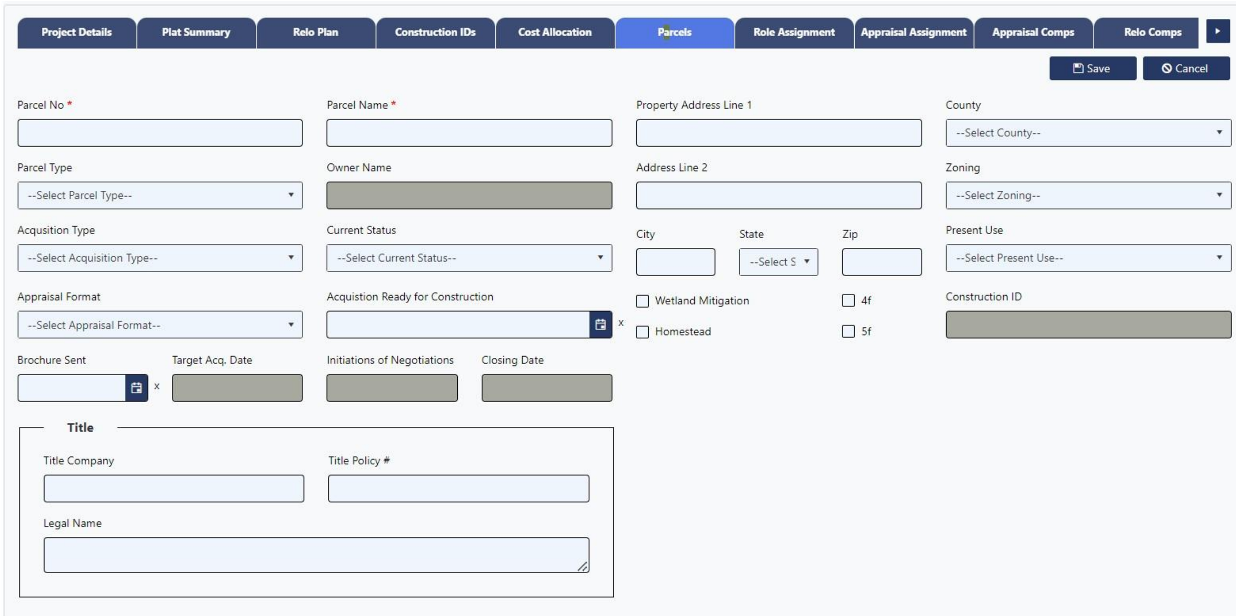
This will show a list of all of the parcels that have been entered for the project by Parcel No. If you would like to go to the Parcel module, click the open button in the Open Parcel column of the table in the row of the parcel that you would like to view or enter data for.

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.

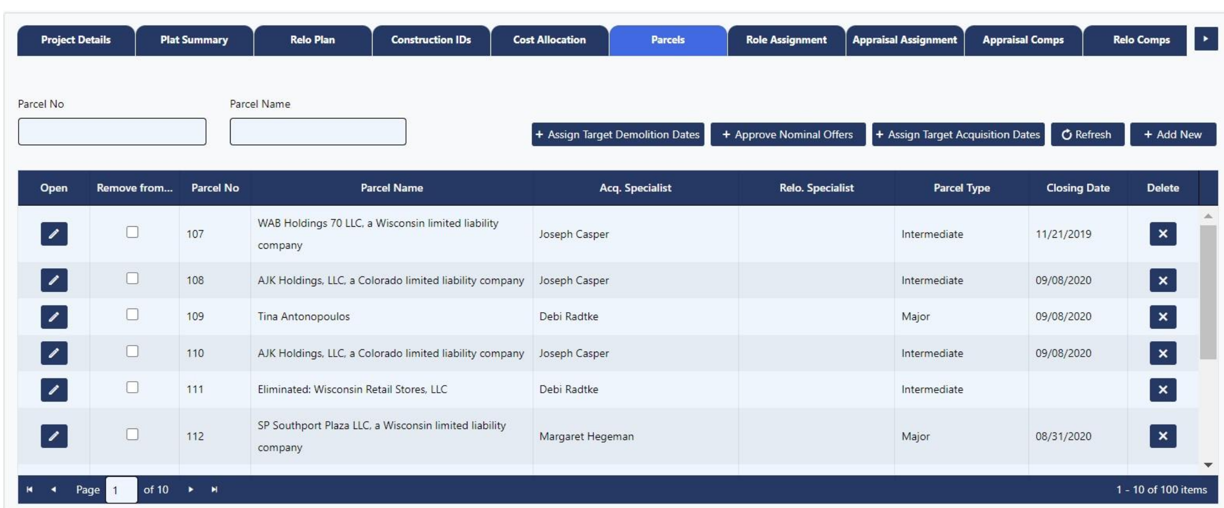
If you need to edit or view the data for a parcel, click the view/edit button in the row of the desired parcel and the same window as shown below for the adding a new parcel will open. When the window opens, you will have to click the edit button to make updates to the data. When you have completed changing 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:

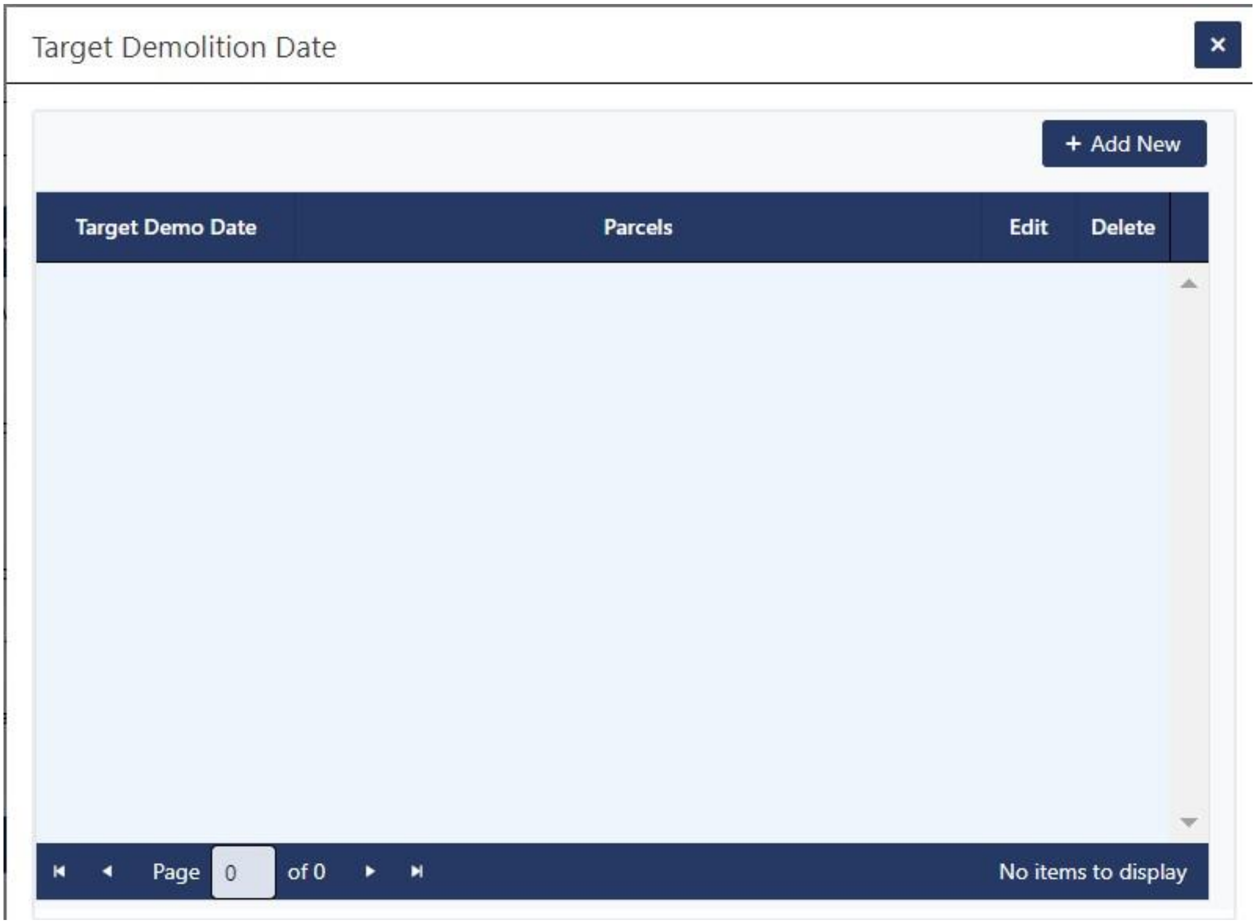


Parcel No and Parcel Names are required fields on the screen. All other data is optional to be able to save the parcel record. This "Parcel Information" screen will be discussed in further detail in Section 7.1. When you have completed entering the data, click the save button. If you do not wish to save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



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

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:

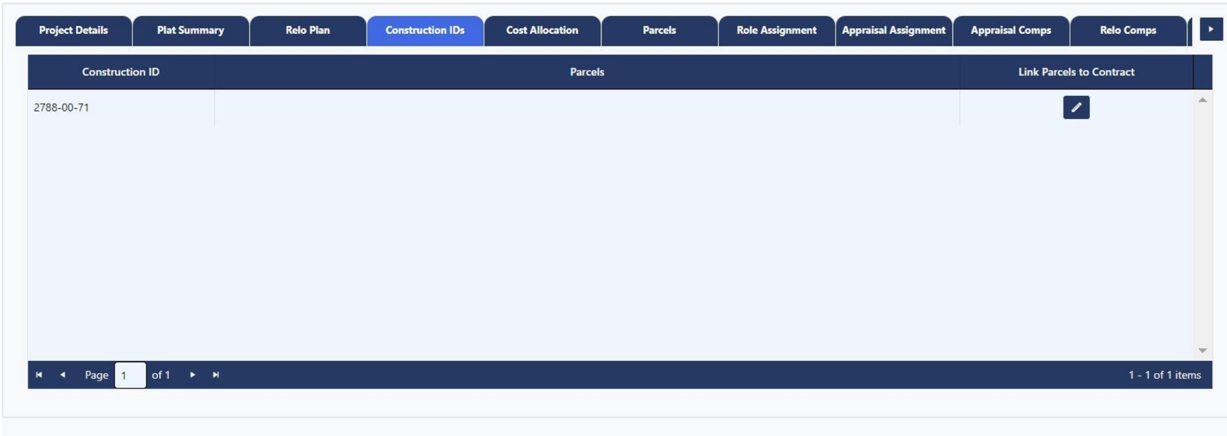


Click Add New and the following screen will show up:

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:

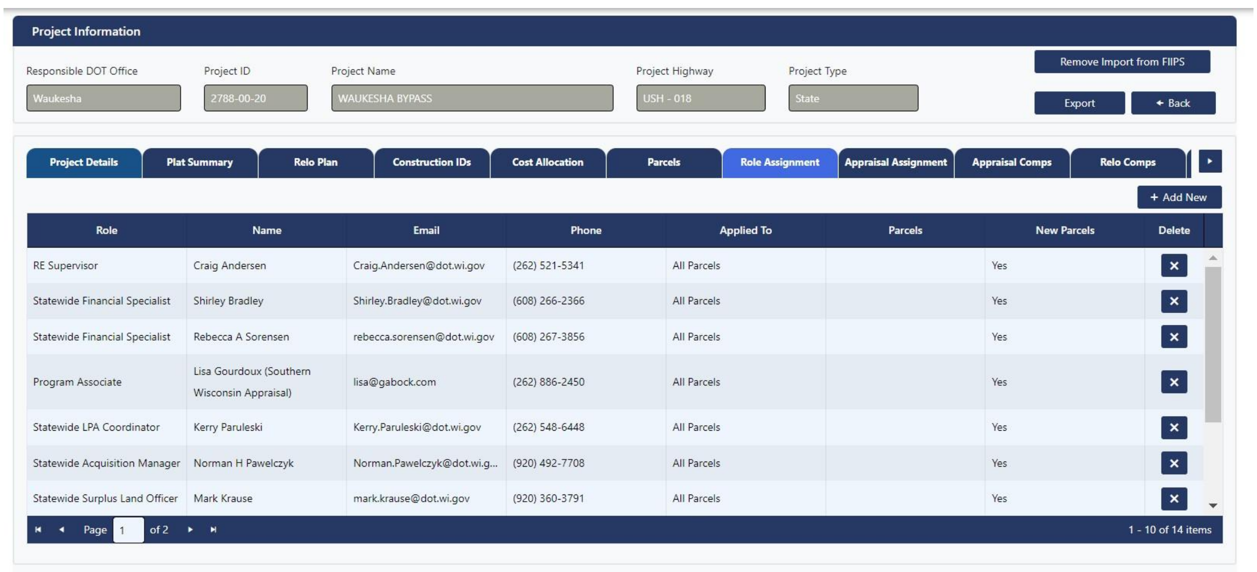
The Construction Id would show up as read only, select one or more parcels Once selected hit the save button and the parcels selected will be updated to have the Construction Id.

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:

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

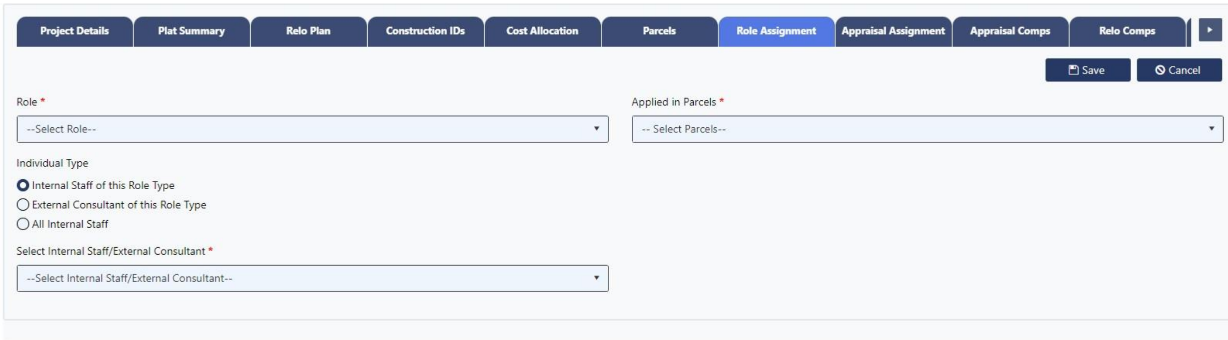
6.1.5 Assignments Tab

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



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	✕

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:



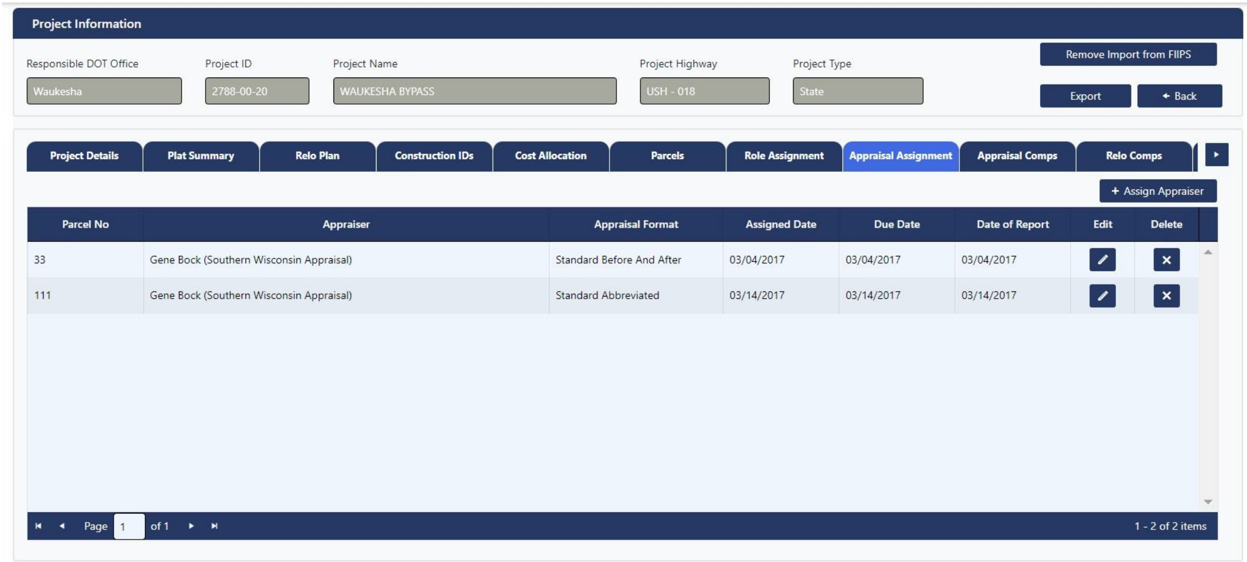
First choose the Role that you would like to assign an individual to. Next choose whether the individual is an internal staff person or an external consultant. This will populate the dropdown appropriately. Choose the desired individual from the dropdown. If the desired person does not appear in the 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:



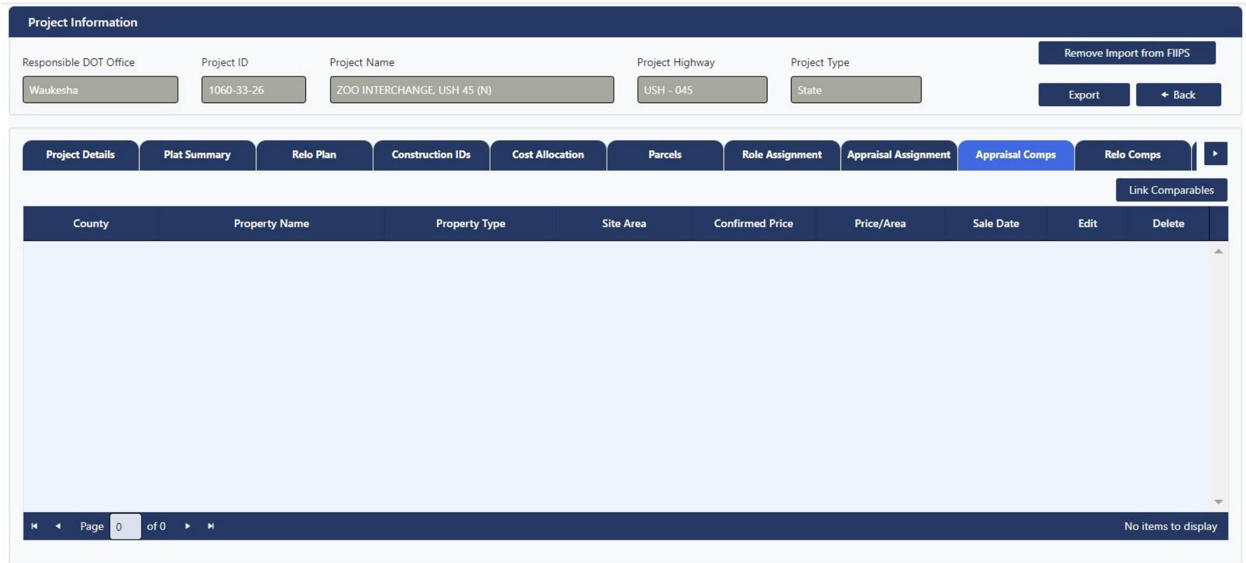
The list will show all of the appraiser assignments for the project. To set up a new appraisal assignment click the Assign Appraiser button and the following will open:

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.

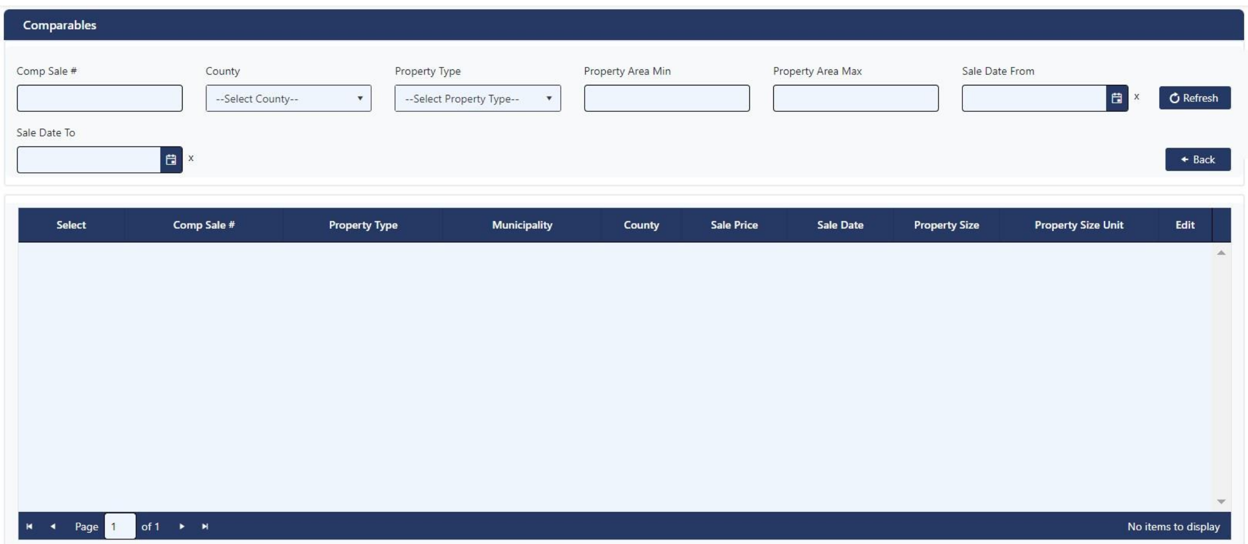
6.1.7 Appraisal Comps Tab

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

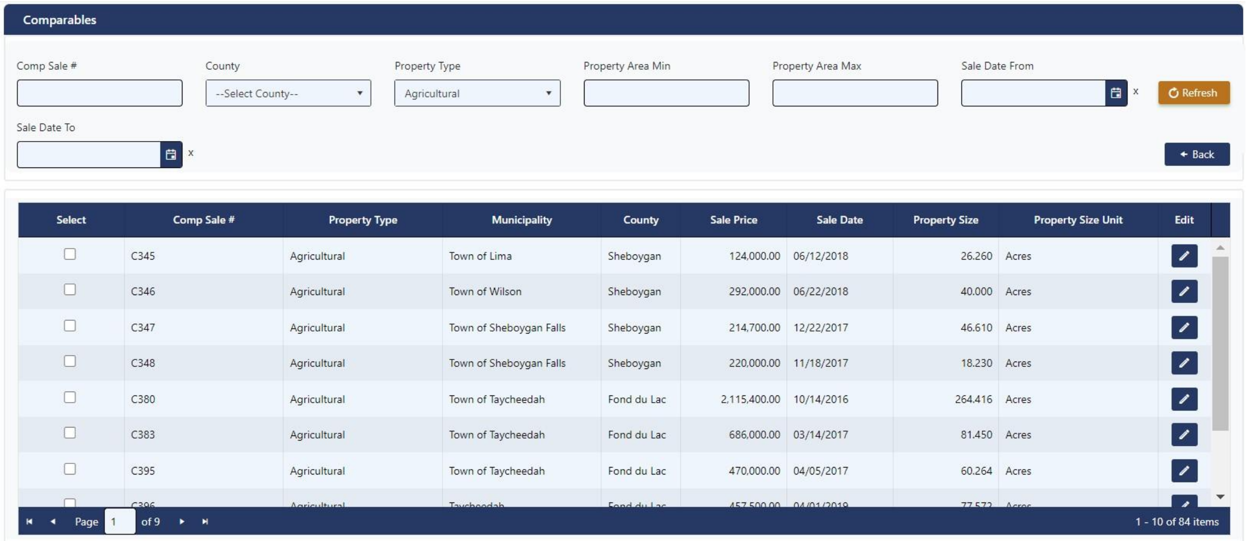


This screen will show list of comparables that are linked to the project

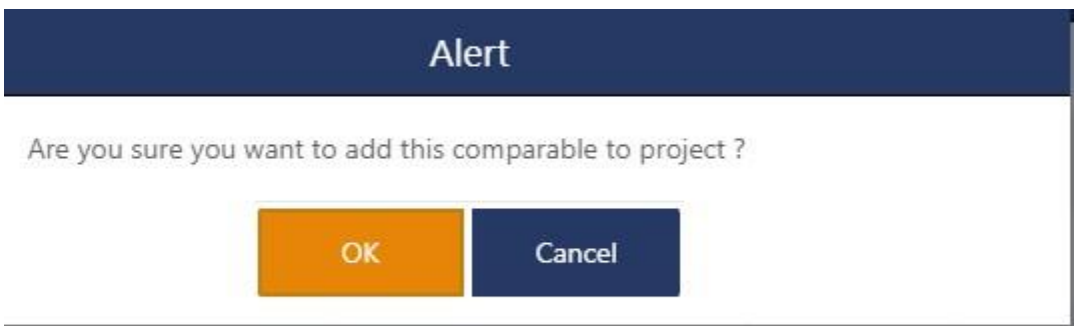
In order to link existing comparables to this project click on Link Comparables and the following screen will popup:



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

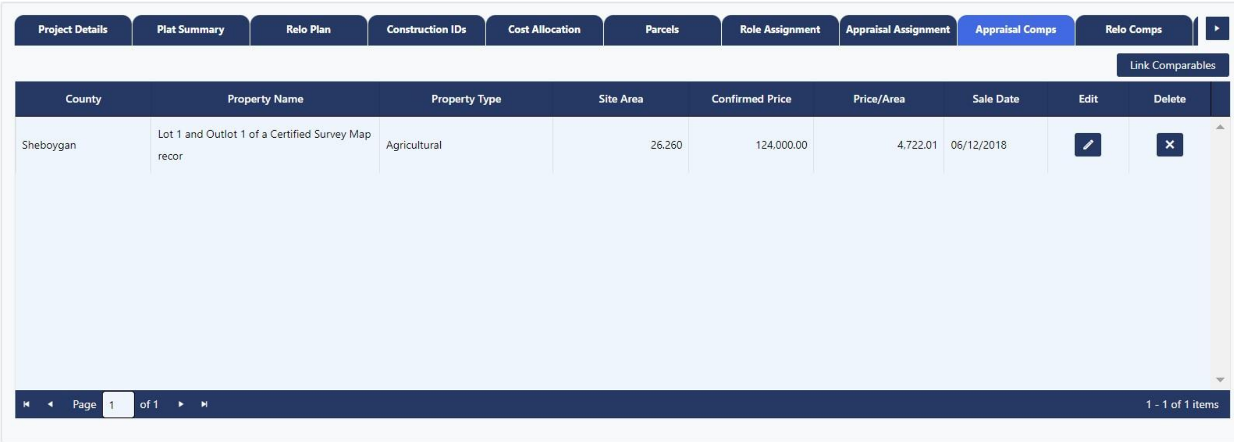


Click on the Select checkbox in the first column to link that comparable with the project The following message will show up:



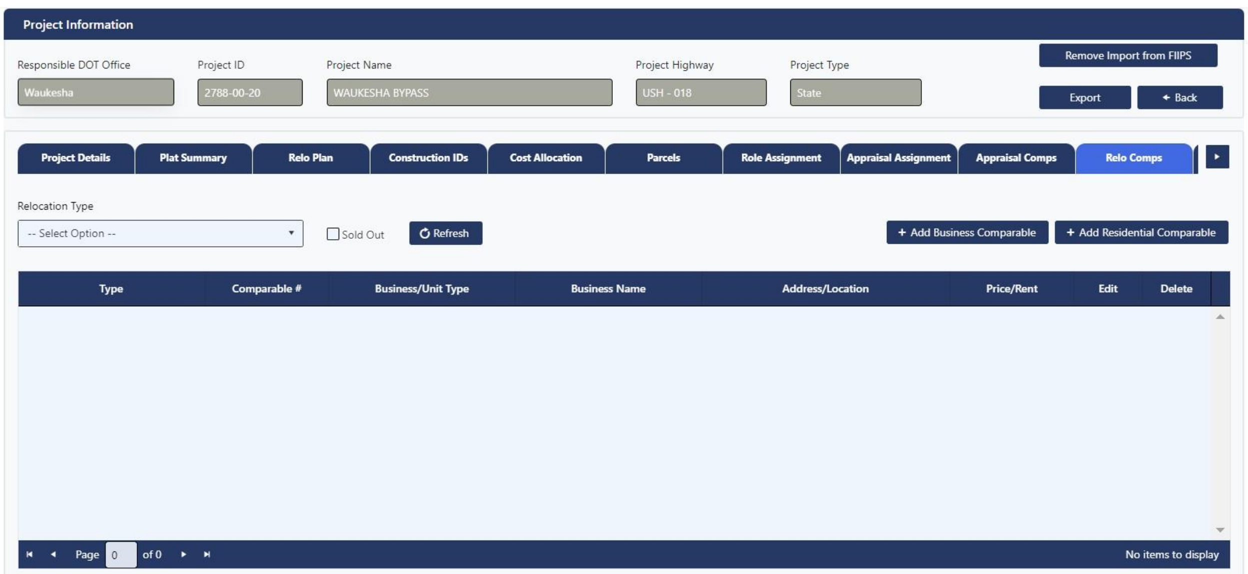
Clicking Ok will link that comparable to the project. You can continue to include multiple comparable from the list to link to the existing project.

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:

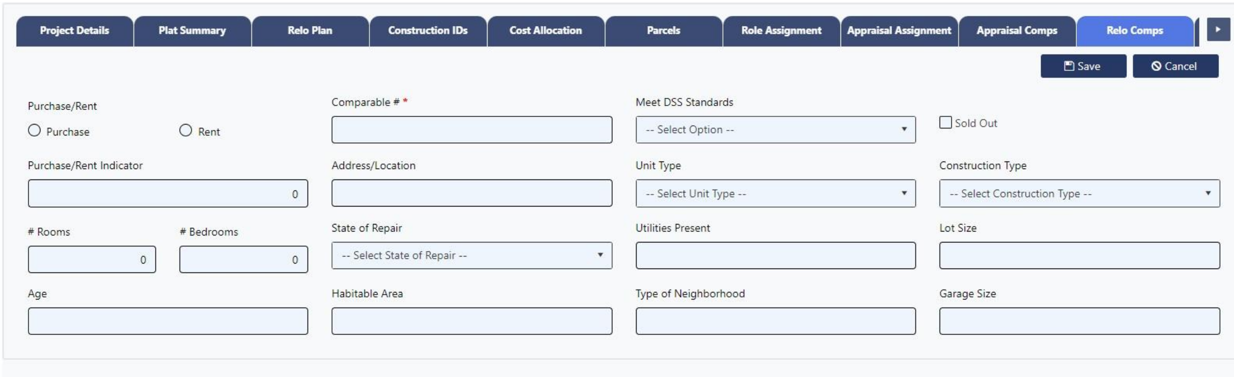


6.1.7 Relo Comps Tab

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

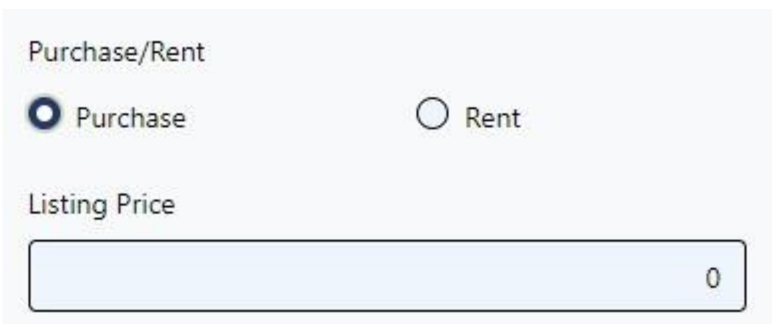


All Business and Residential relocation comparables are entered here for a project. These comparables will be used within the Comparables section in Relocations. You can use the filters on the top portion of the screen to view Residential or Business Comparables. You can also check the Sold Out Properties 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:



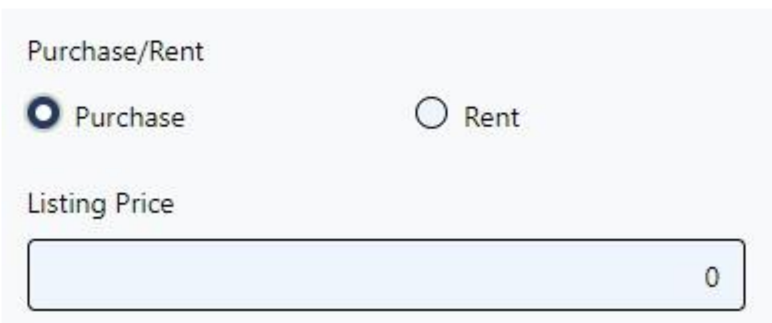
Rent Option Selected

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:



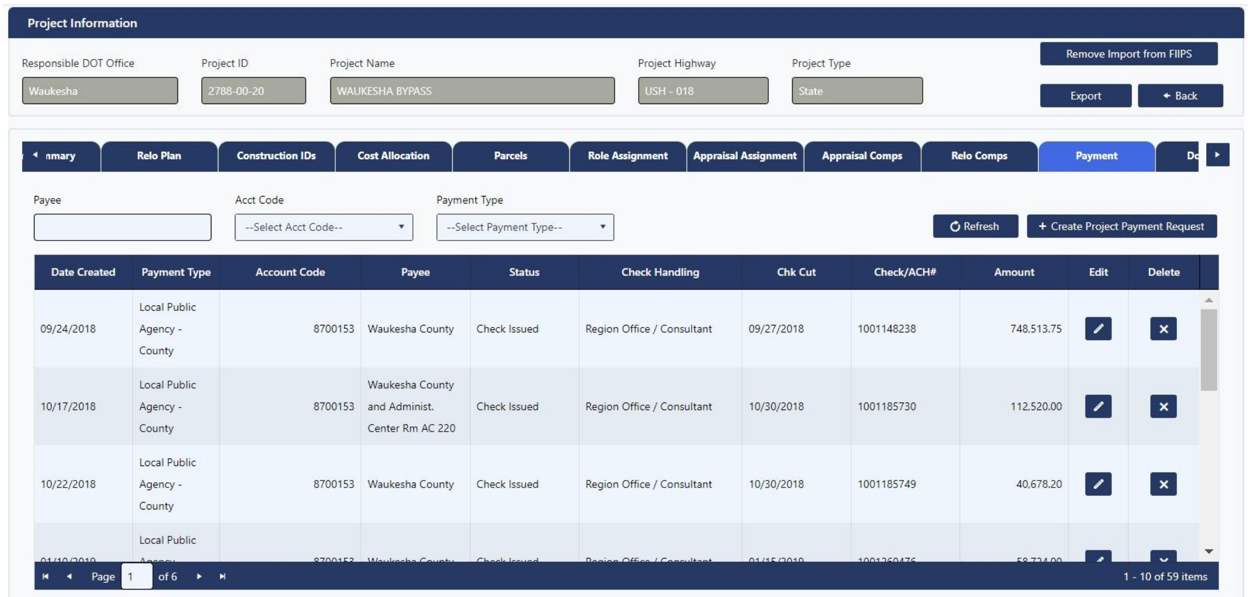
Rent Option Selected

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.

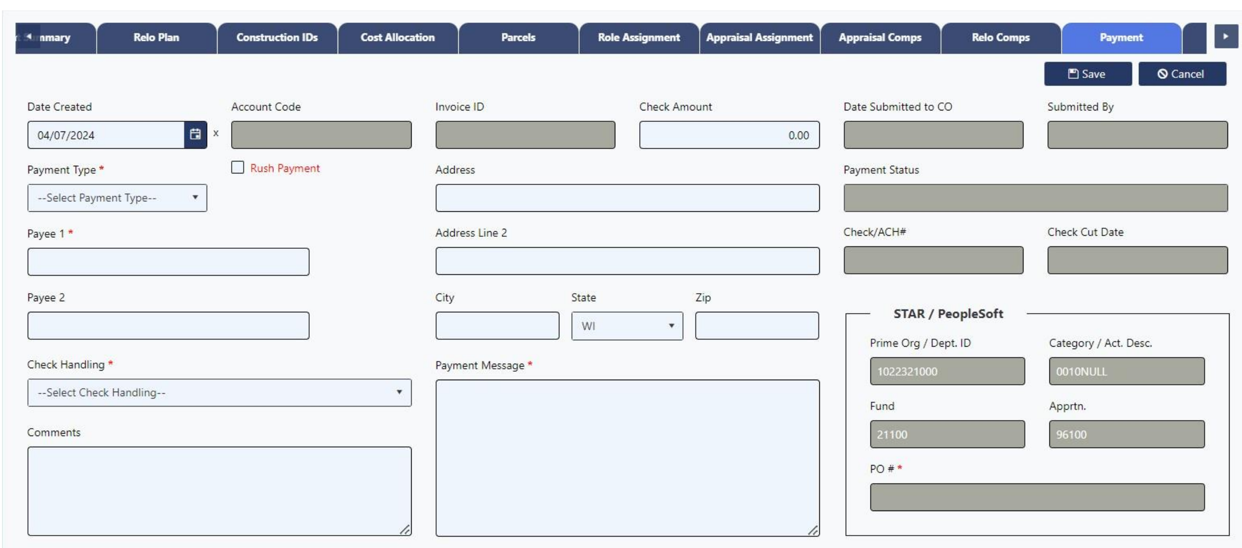
The Relocation comparable entered in this section will be made available to all the Relocation records for all the parcels depending on the type of relocation – residential or business

6.1.8 Payment Tab

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



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:

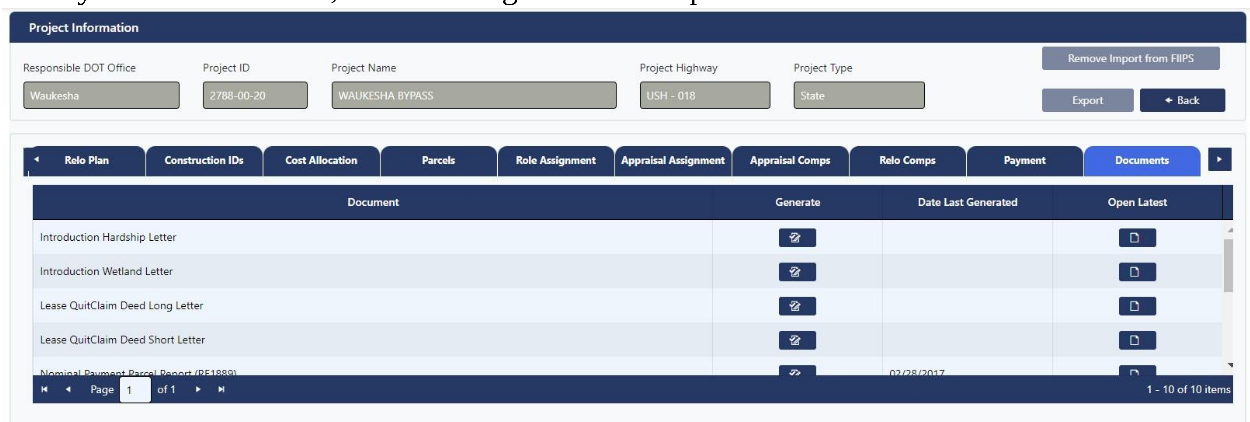


The details on this screen are explained in Section 7.17.

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:



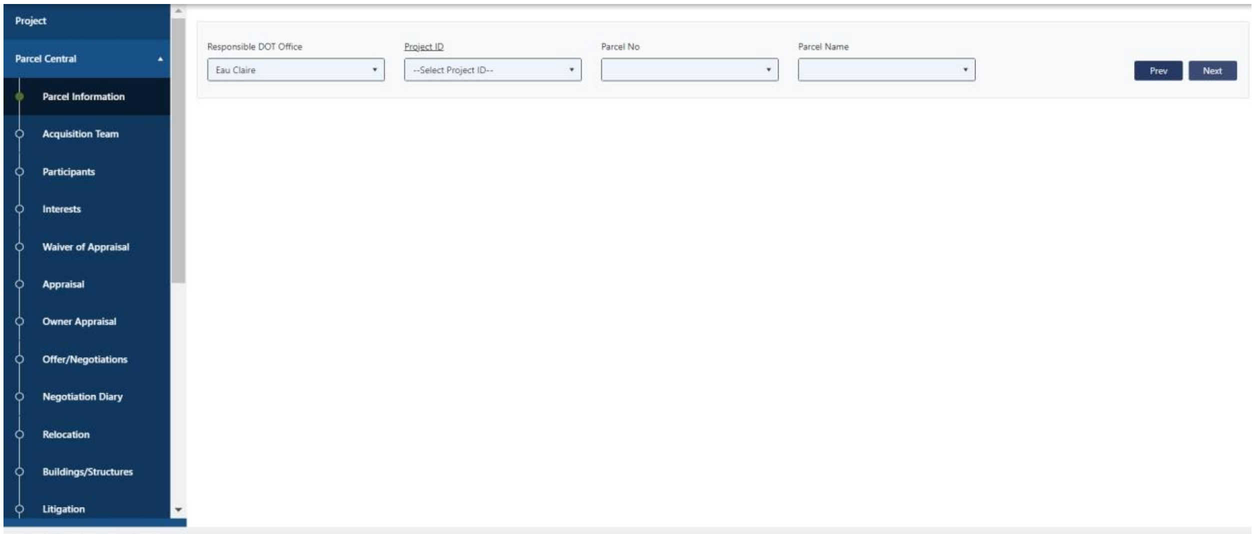
You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the Project Log. The next time you open the Documents tab, the table will be updated with the newly generated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

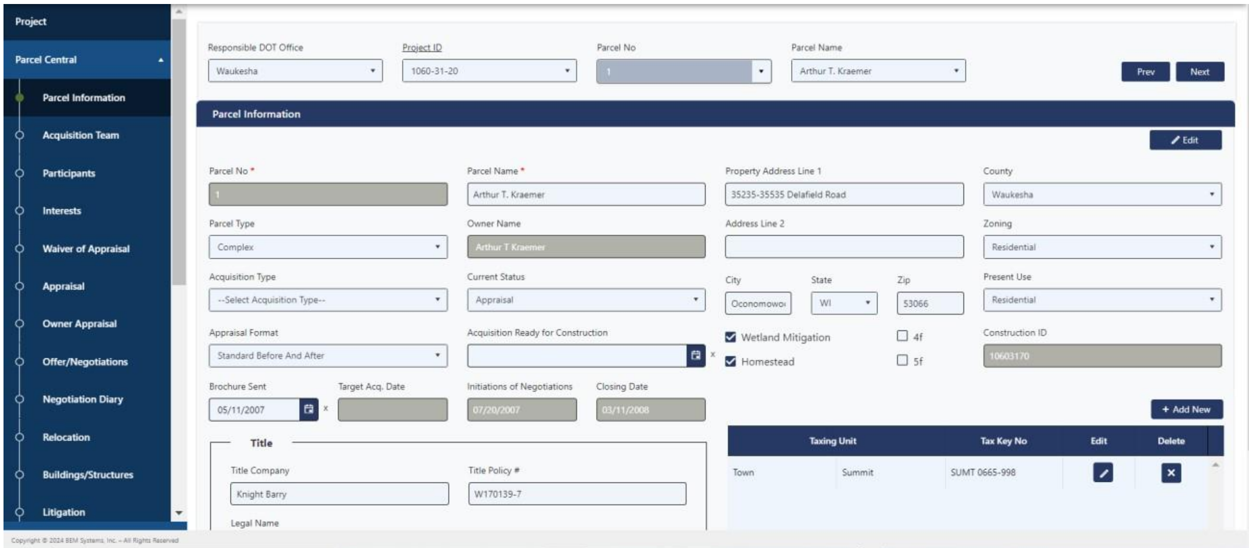
Once you select a parcel the Parcel Menu will be filled in with various choices and the Parcel Information menu item will open by default for the selected parcel

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.

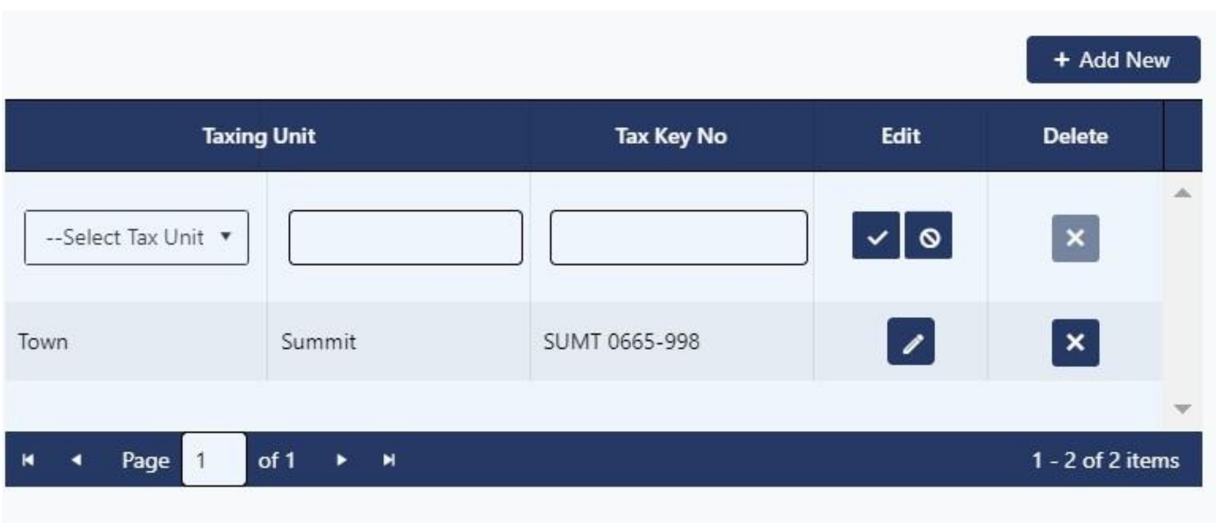
The Parcel Information form includes the basic information about a parcel as shown below.



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.

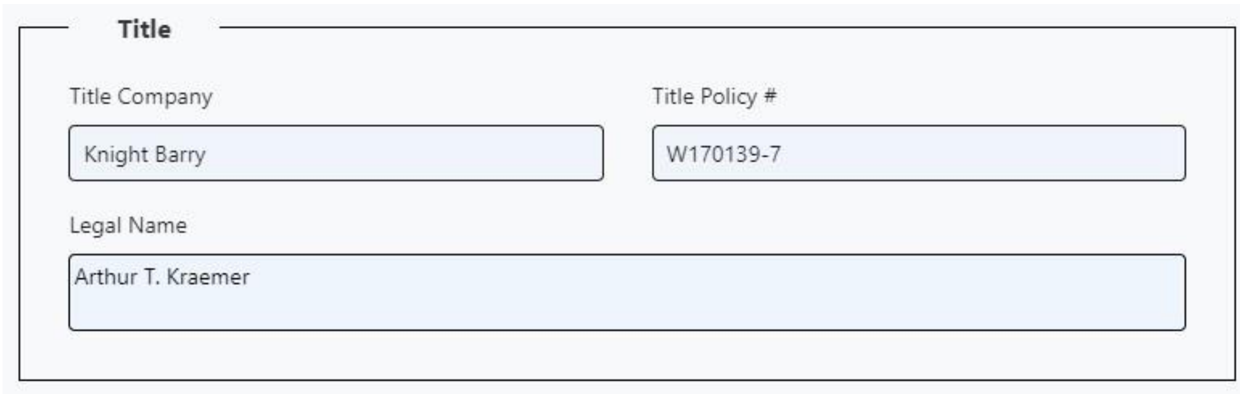
You should use the Add New option only if there are multiple Tax Key Nos for a parcel. You can add Taxing Units and Tax Key Nos by clicking the Add New button. The following screen will open allowing users to add a new taxing unit and tax key no as the first entry in the table:



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.

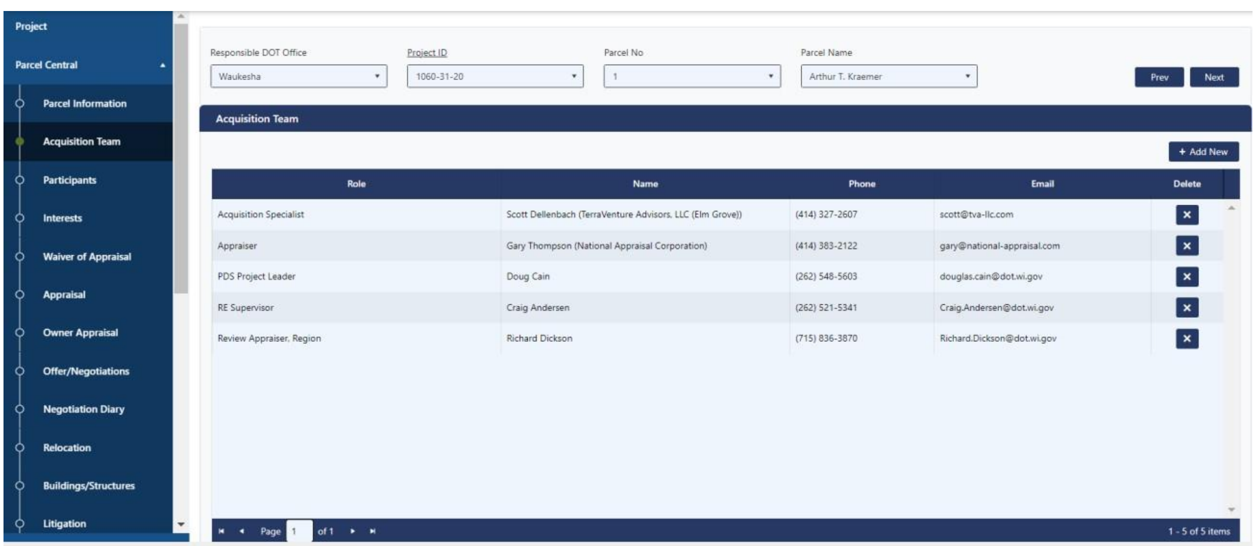
The screen also shows the Title Information, the Legal Name entered on this screen shows up on all the Conveyance documents generated within the Offers/Negotiations section.



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

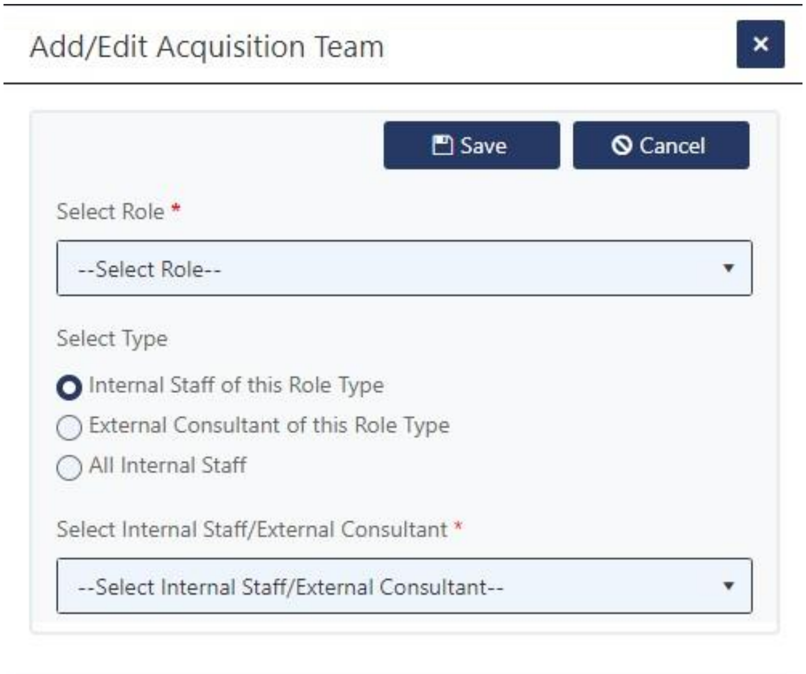
The Assignments established for a project identifies the acquisition team members and their associated role. From the Parcel Central Menu, click on the Acquisition tab. The Acquisition Team form shown below includes a table of the key members involved in the acquisition process.



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:

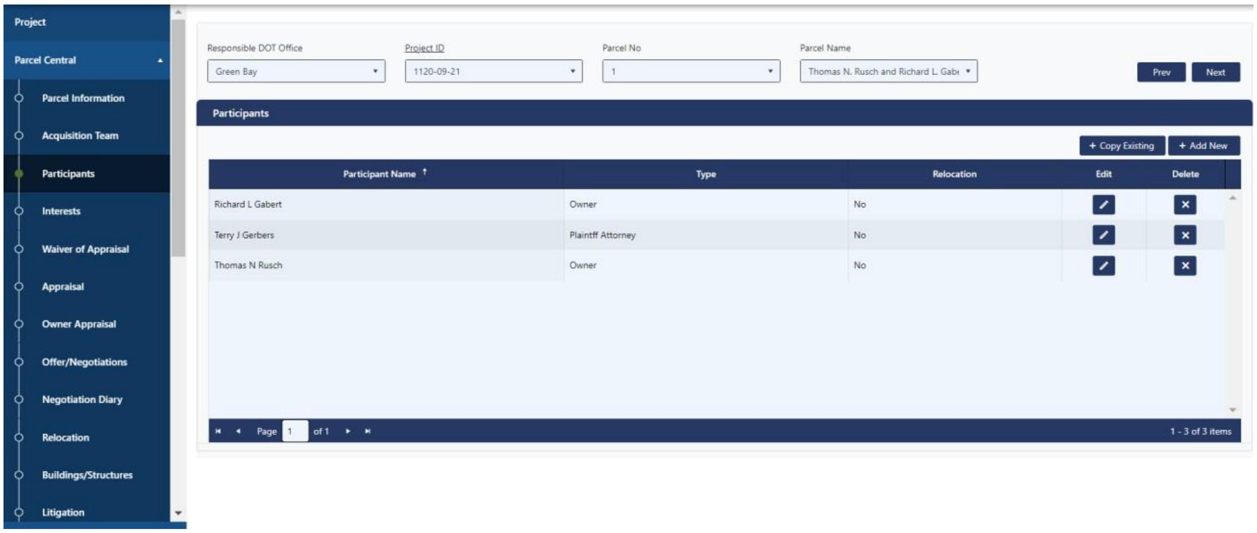


First choose a role from the Select a Role dropdown list. Next choose whether the person being assigned is Internal Staff of this Role Type, External Consultant of this Role Type, All Internal Staff, If the person is a staff member, choose Internal Staff of this Role Type or All Internal Staff. If the 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.

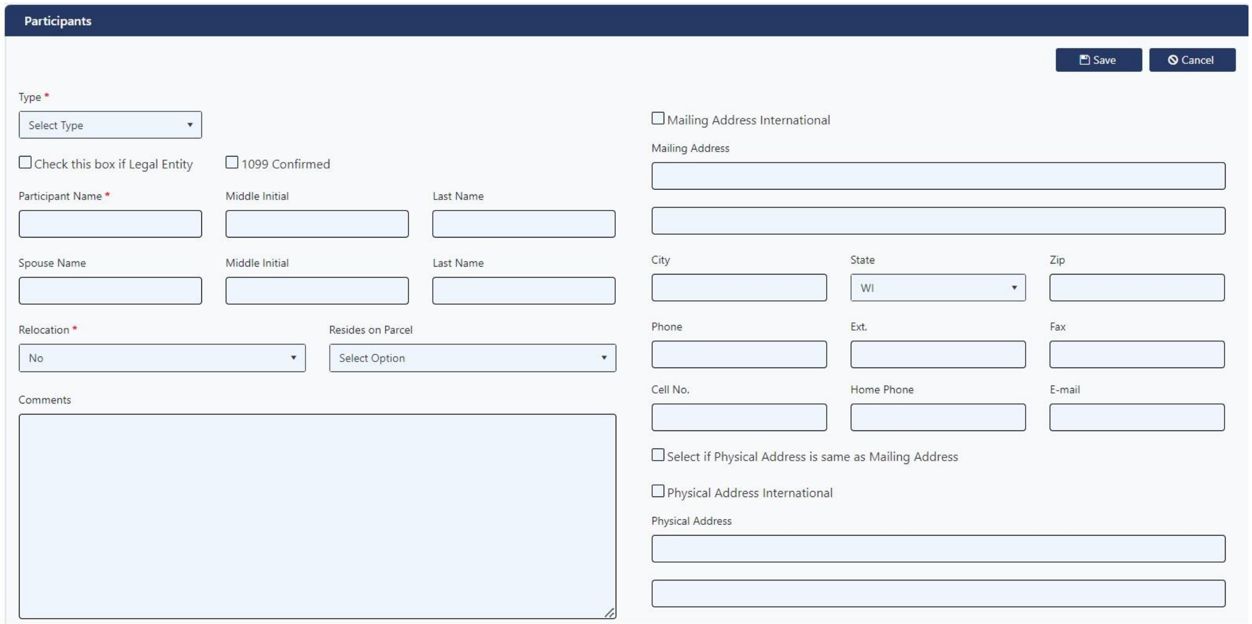
To delete an existing assignment, click the delete button next to the name of the person you would like to delete. This person will now be deleted only for this assignment for the property in which you are working. It will not be deleted from anywhere else in the system.

7.3 Participants

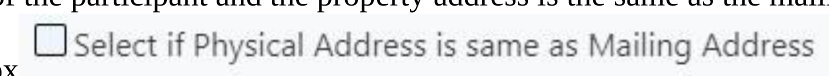
This module is where information for the owner(s) and/or tenants that may be occupying the property, mortgagee, lien/judgment, delinquent taxes, plaintiff attorney, contact persons, trustee, Sign Owner, etc. When you click on the Participants menu item under Parcel Central menu you will see the following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



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 + Add New and the following form will be displayed:



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.

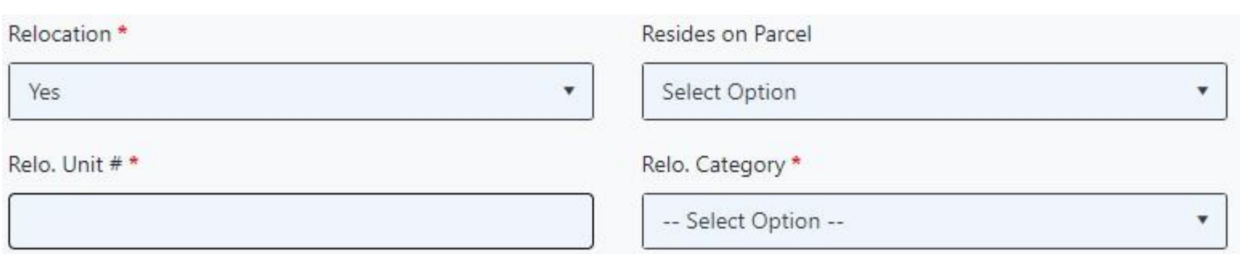
If property address was not entered on the parcel information screen and if you entered the mailing address of the participant and the property address is the same as the mailing address then check the box 

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

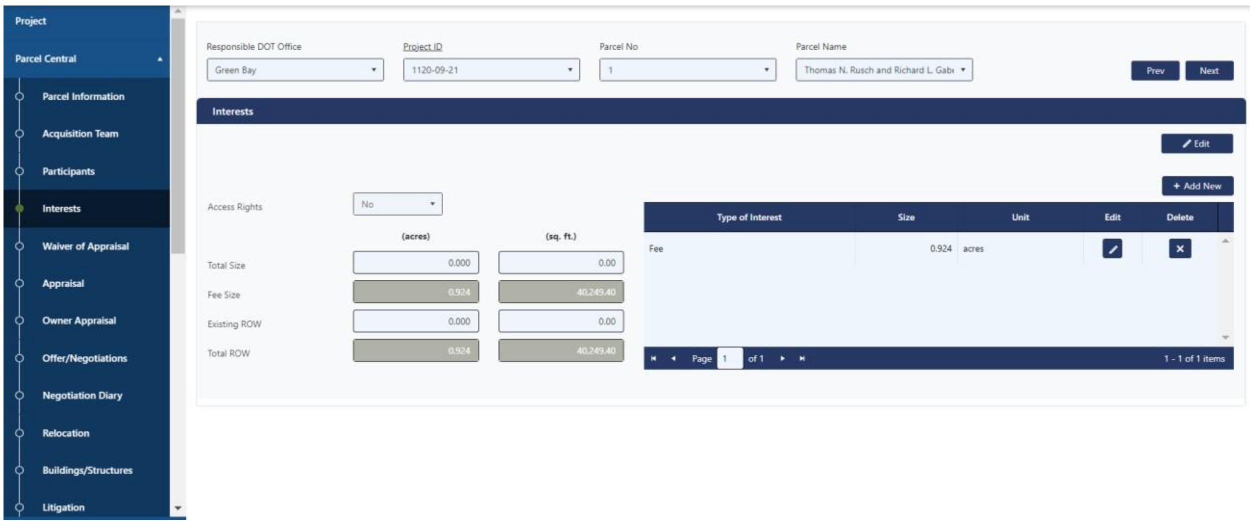
A relocation record will be created from the participants screen by selecting Yes in the Relocation dropdown. Once Relocation is set to Yes 2 additional data fields will show up allowing you to enter the Relocation Unit # and the relocation category as below:



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 

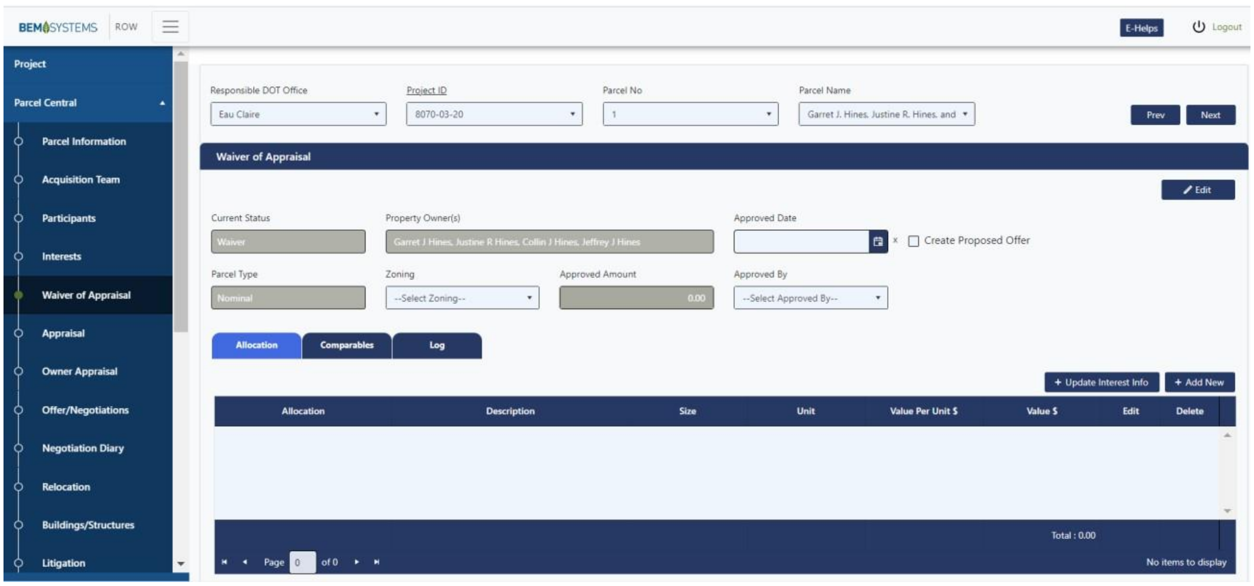
whether or not you are in edit mode and the table will allow you to enter the Interest Type information:

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.

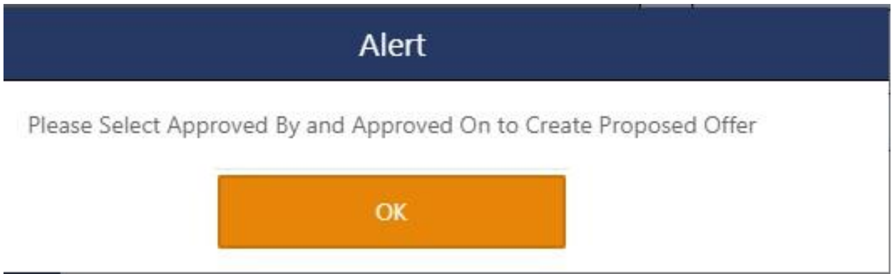
If you click the notify appraiser button, an email will be sent to the assigned appraiser to notify them if there are plat changes for the parcel.

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:

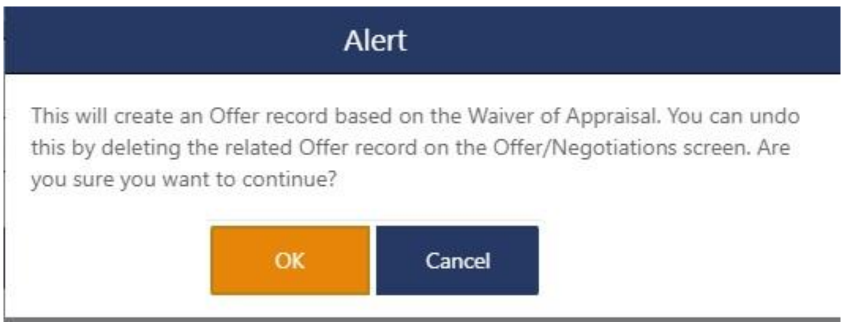


The right portion of the screen shows the Approval details which will allow you create an initial Waiver of Appraisal offer. Please check the Check Proposed Offer checkbox in order to create an initial offer, also make sure to enter Approved By and Approved On fields when the Create Proposed Offer is 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:

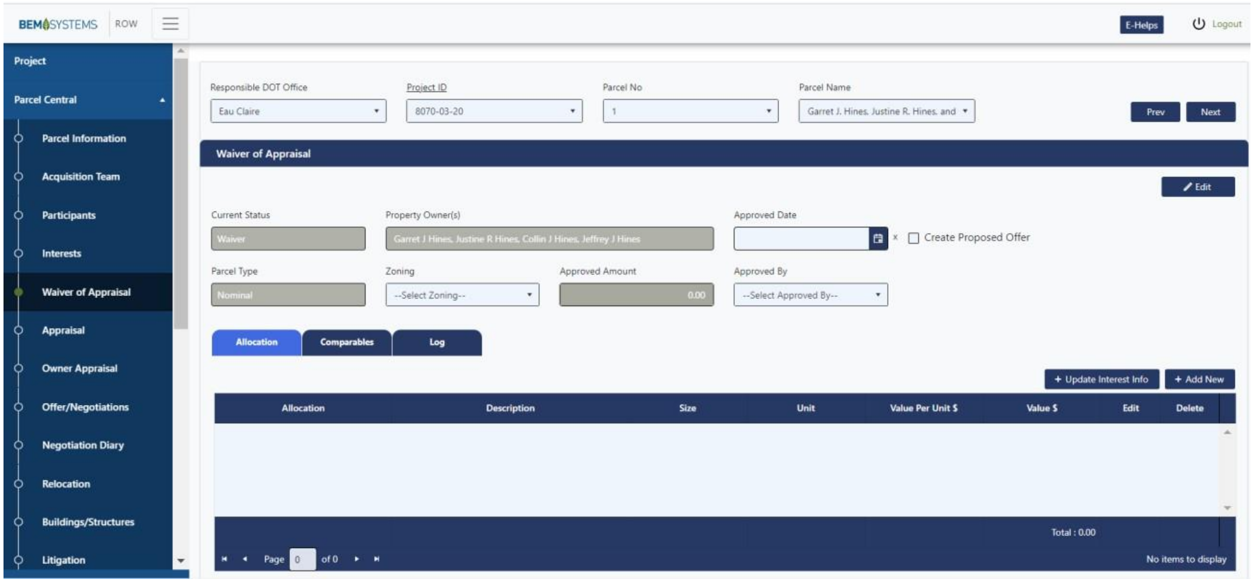


Click Ok and a Waiver of Appraisal offer record will be created on the Offers/Negotiations screen. Once an offer is created the system will lock the Waiver of Appraisal record including all the tabs within this screen. If you do not wish to make an initial Waiver of Appraisal offer you can click the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

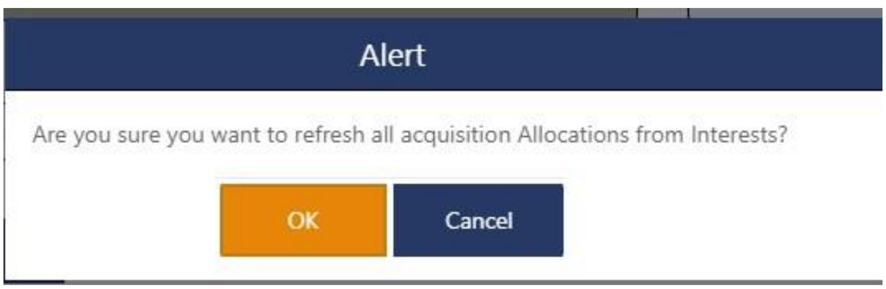
If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

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:

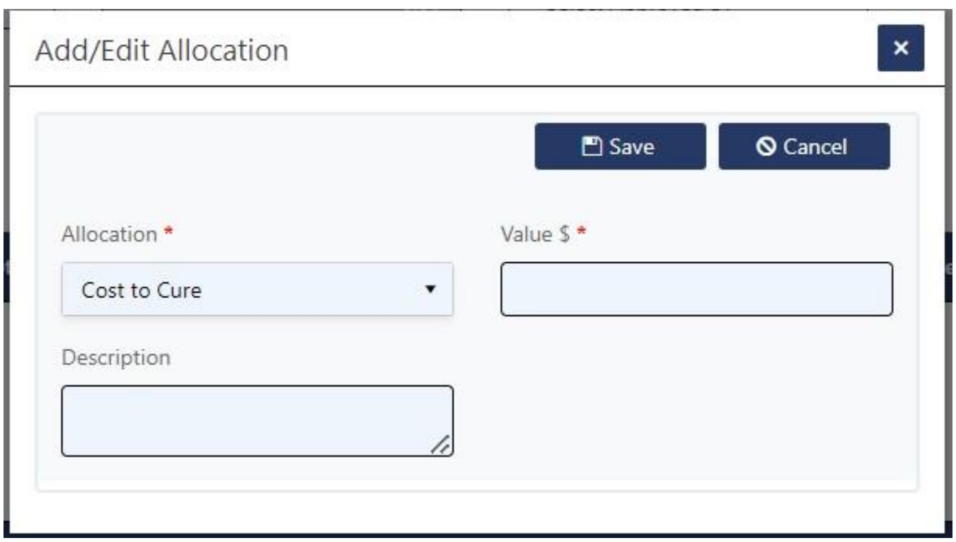


The detail items including the size will be initially populated from the Interests screen. All the Fee/Non Fee interests added on the Interests screen will show up on the Allocation screen.

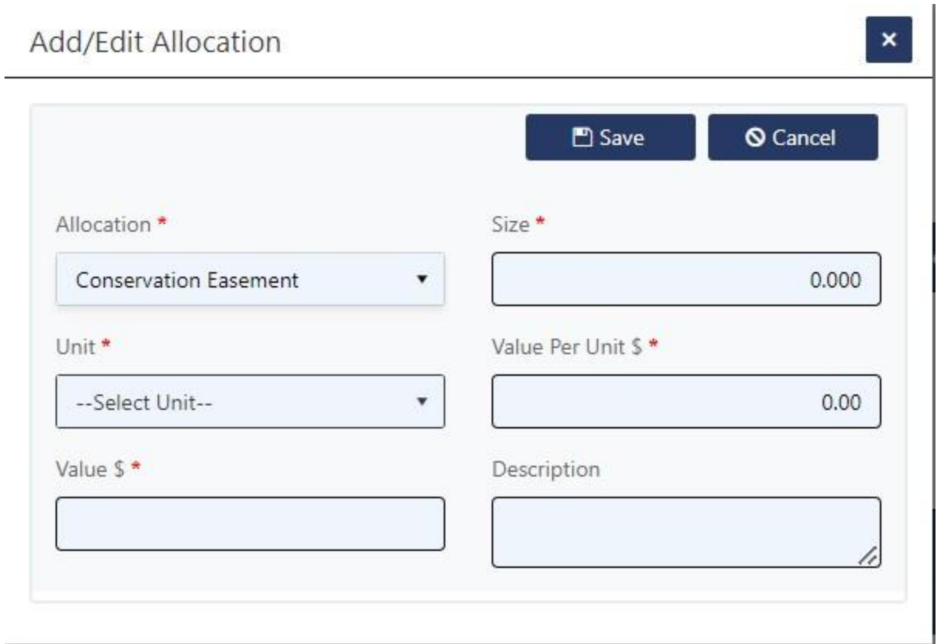
You are required to enter a per unit value, the total value or change the unit type for each type of allocation entered on this screen.

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:



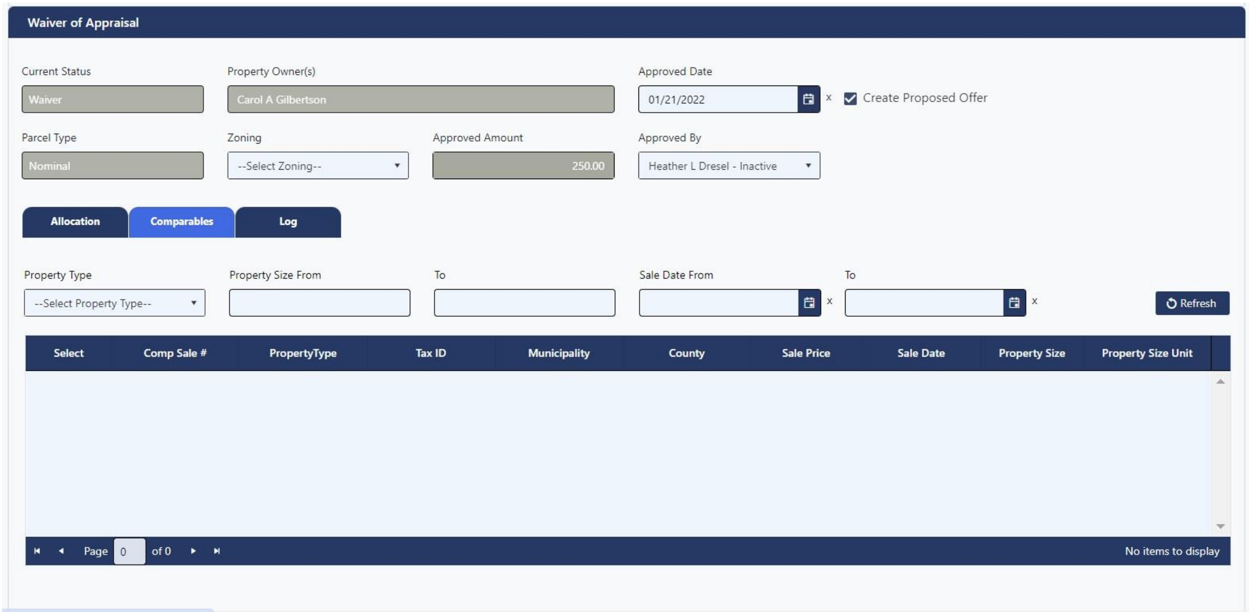
Once you are done entering the required information for an allocation hit the save button. If you do not wish to save the changes, click the cancel button.

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

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

7.5.2 Comparables Tab

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

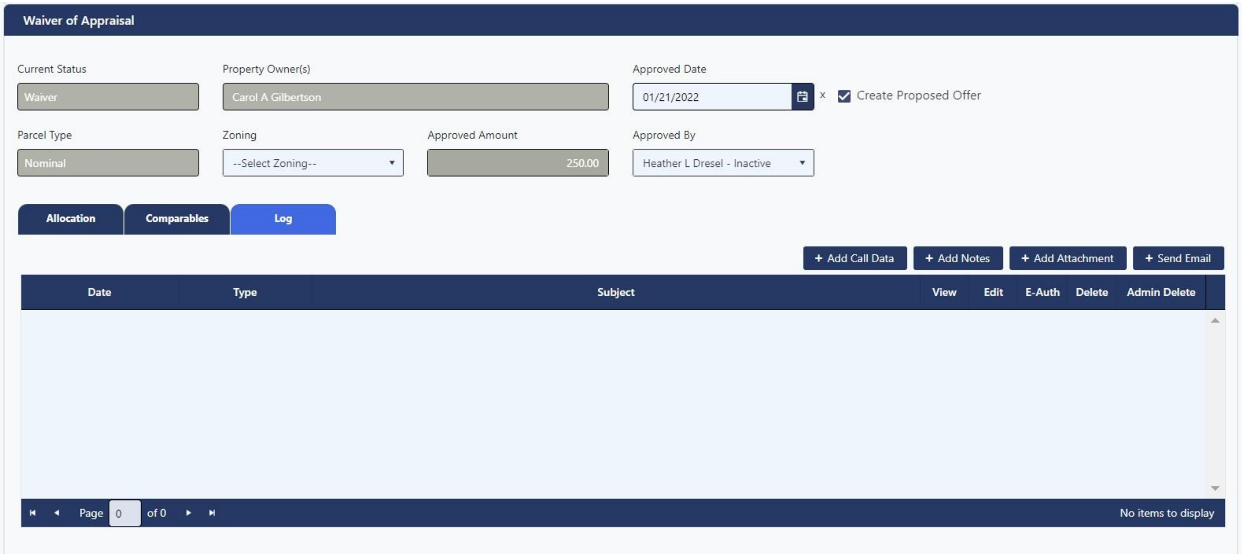


The table will include all Comparables that were associated with this project in the Project – Appraisal Comps tab. You can filter the list of comparables associated by using the filters on the top portion of this tab area. You can filter the comparables by Property Type, property size range and sale 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

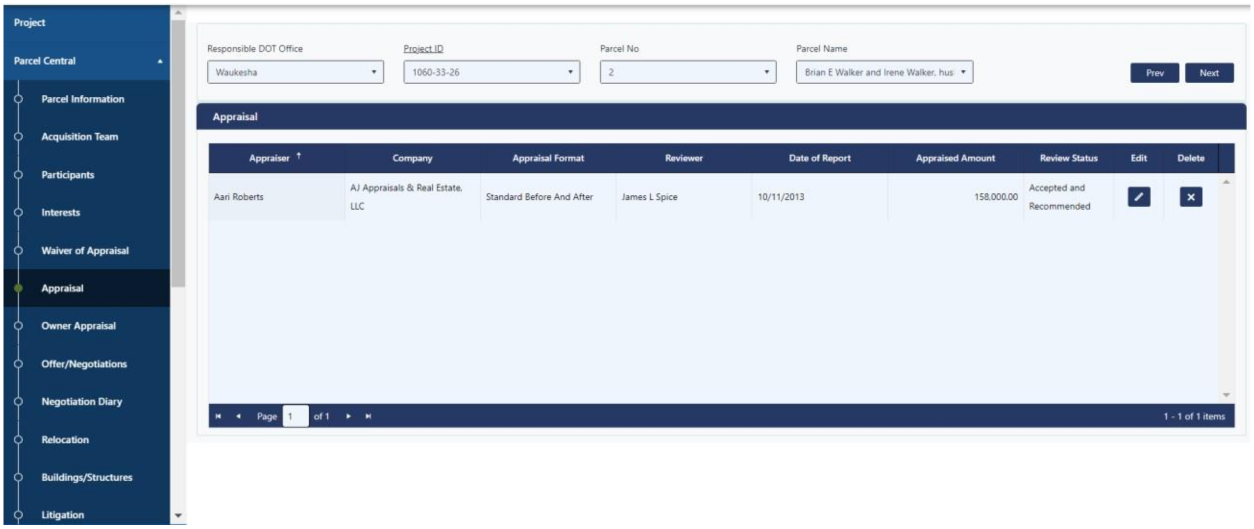
To access the Waiver of Appraisal Log for a parcel, click on the Log tab. The following screen on the bottom portion of the page will open:



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

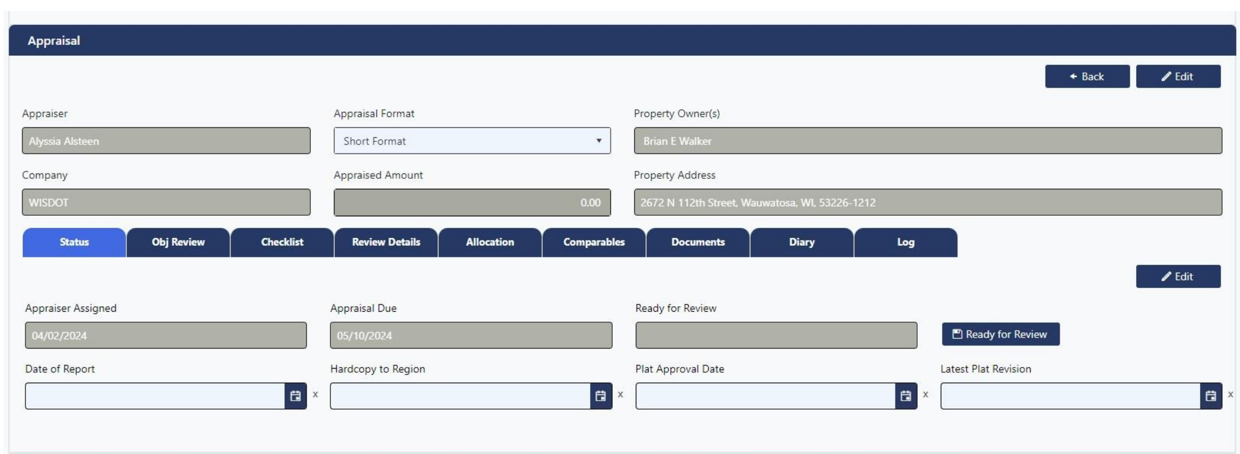
7.6 Appraisal

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



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.

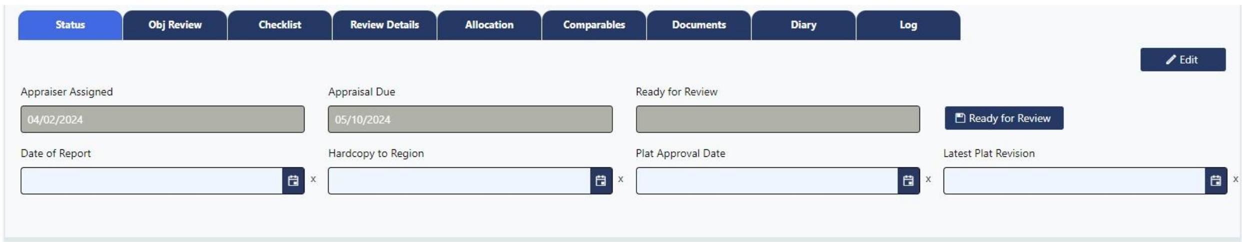
The Appraisal Details screen will also show up when you click the edit button in the row of the appraisal you need to access. If you need to delete an appraisal, click the delete button in the row of the appraisal you wish to delete. After you have chosen an appraisal from the table, the following will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



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

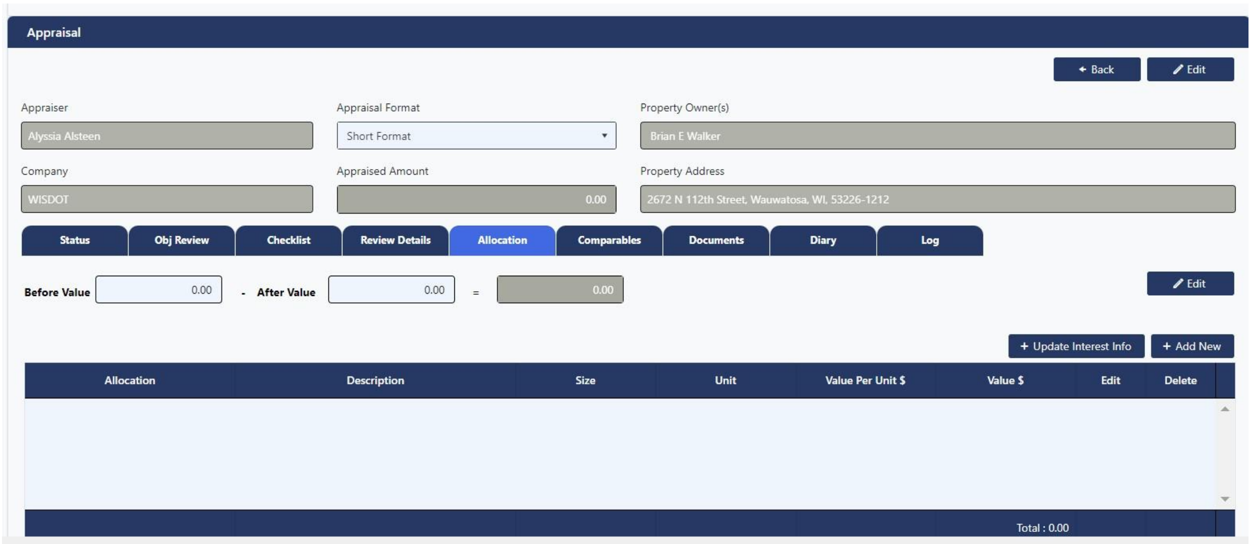
Clicking on this button will show an email button which will address the email to the Review assigned

Once the appraiser 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:

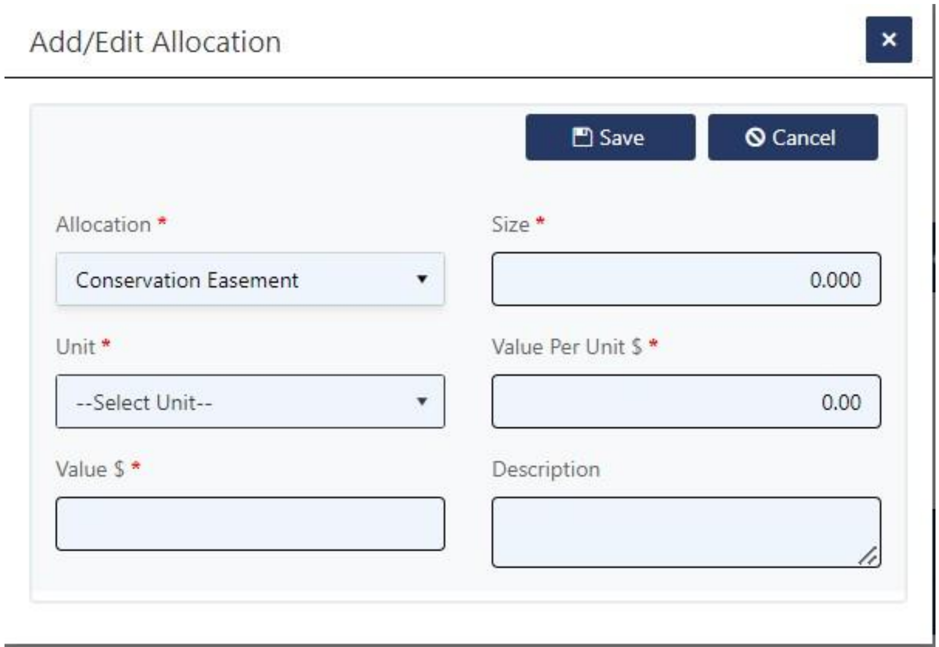
The detail items including the size will be initially populated from the Interests screen. All the Fee/Non Fee interests added on the Interests screen will show up on the Allocation screen.

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:

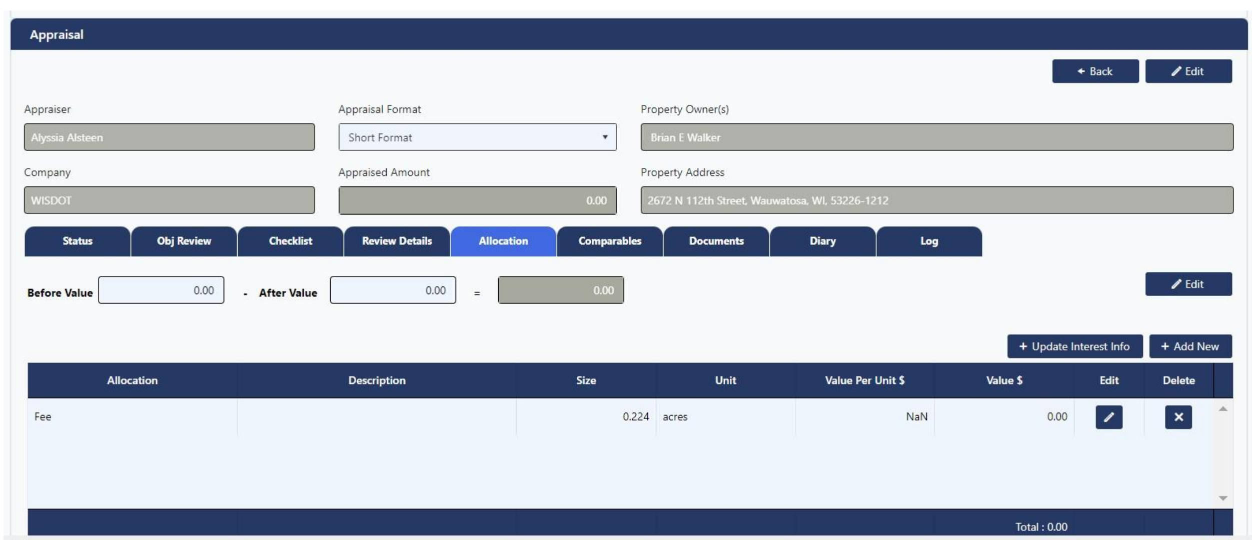
Please enter a type of allocation, depending on the type of allocation you select additional fields will show up as below:

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:



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.

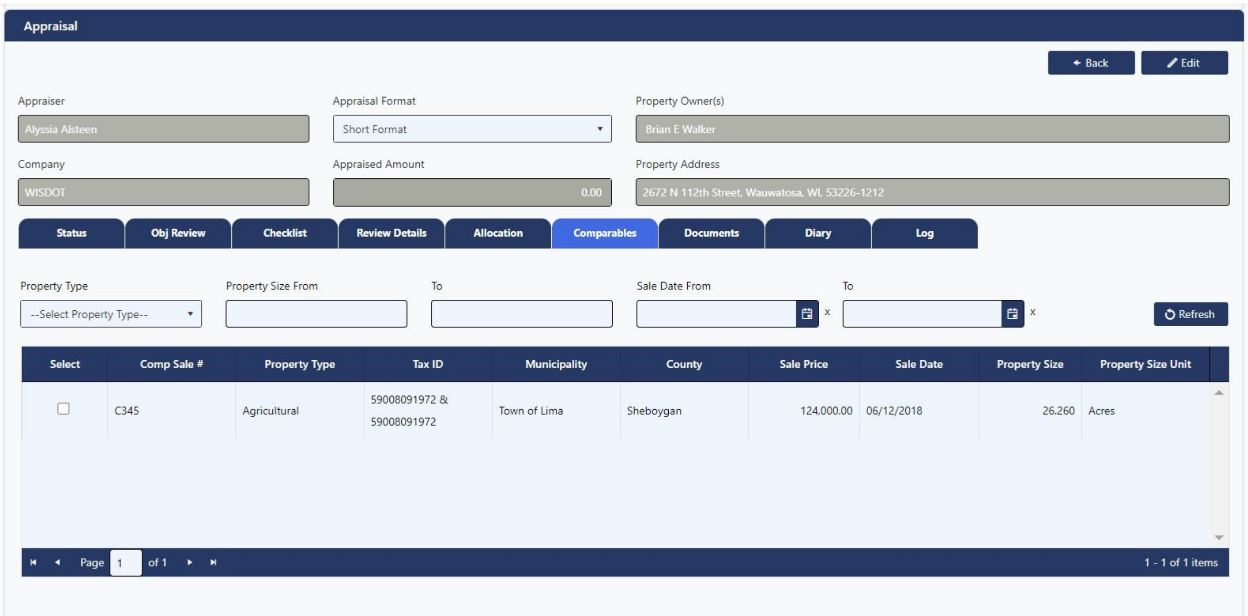
Once you are done entering allocations within the Allocation tab you will see a screen as below:



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:

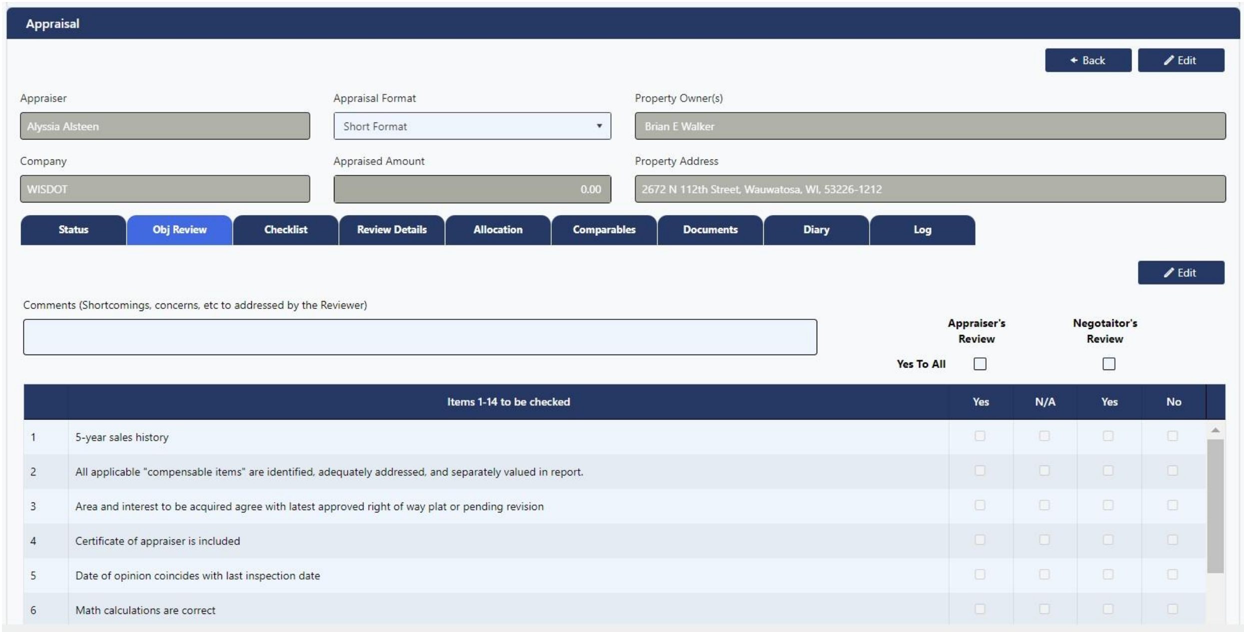


The table will include all Comparable that were associated with this project in the Project - Appraisal Comps tab. You can filter the list of comparable associated by using the filters on the top portion of this tab area. You can filter the comparable by Property Type, property size range and sale date 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:

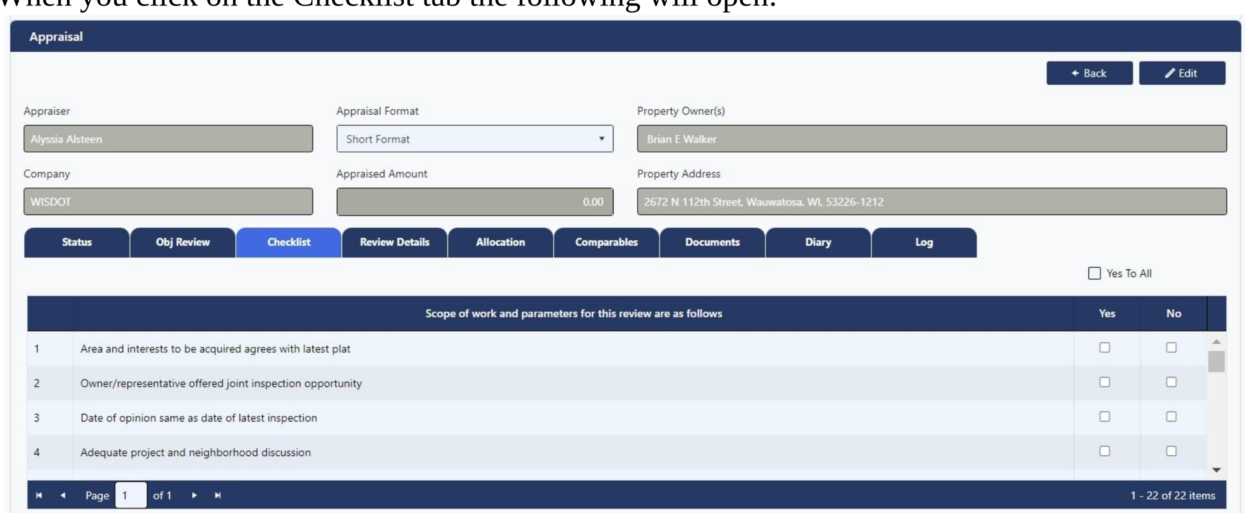


This screen shows list of items to be completed by the Appraiser, depending whether each item is satisfied as part of the appraisal process please check the Yes column, if Not Applicable then check the N/A checkbox. Please check the Yes to All checkbox if you need to mark all items as Yes, uncheck this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

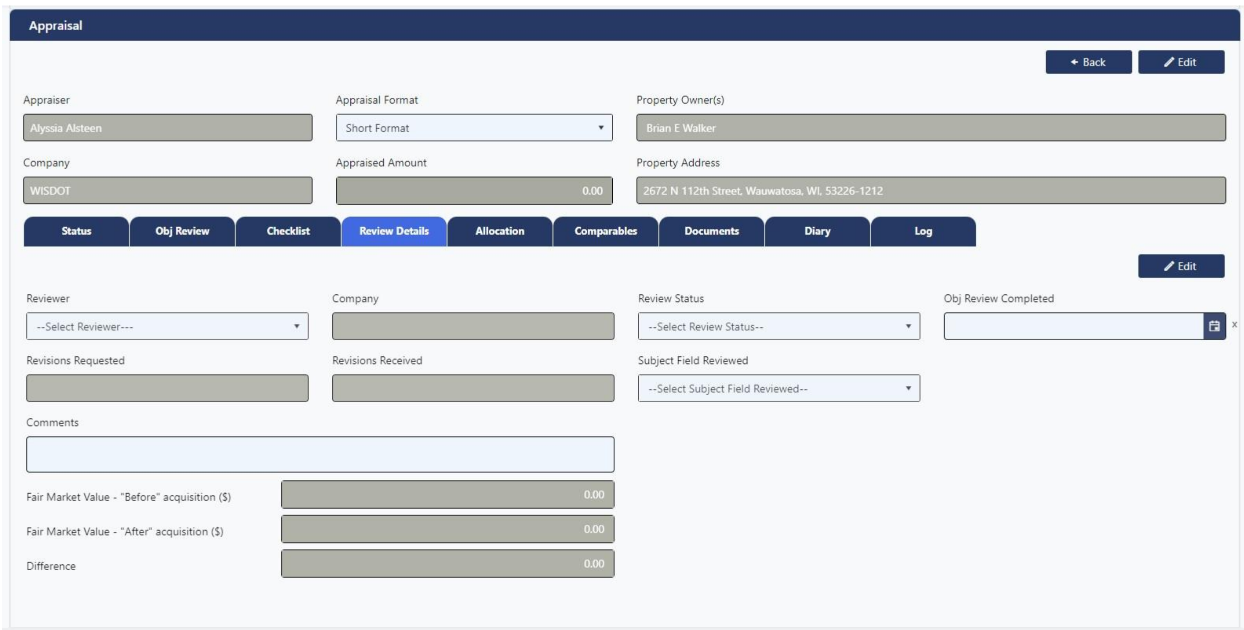
When you click on the Checklist tab the following will open:



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.

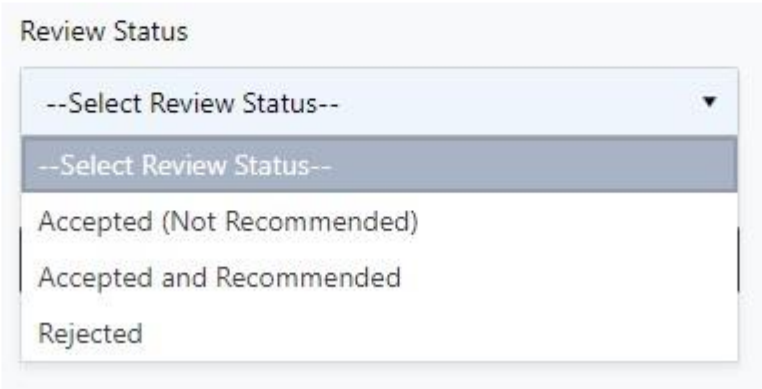
7.6.7 Review Details Tab

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

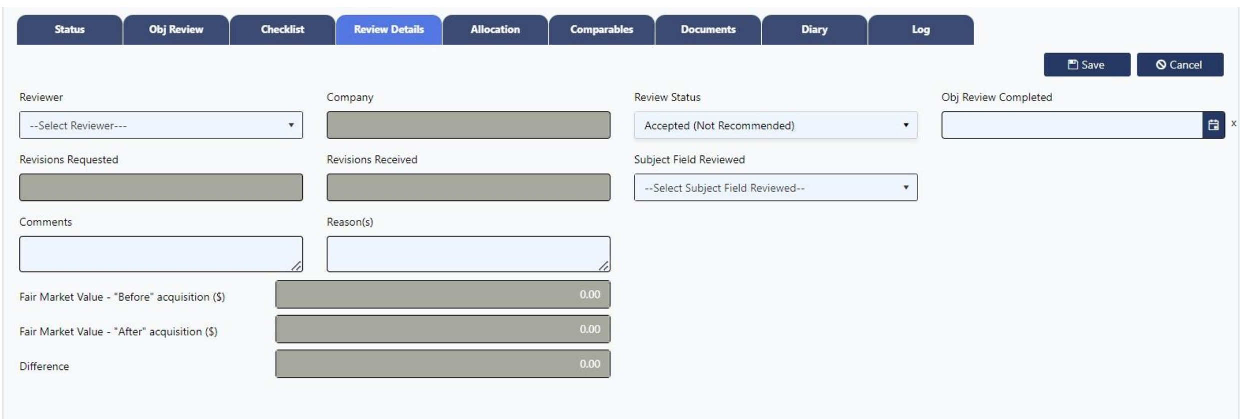


There are data fields on this screen which are read only, if a Review appraiser is not assigned for the parcel the Reviewer and the company fields will be blank

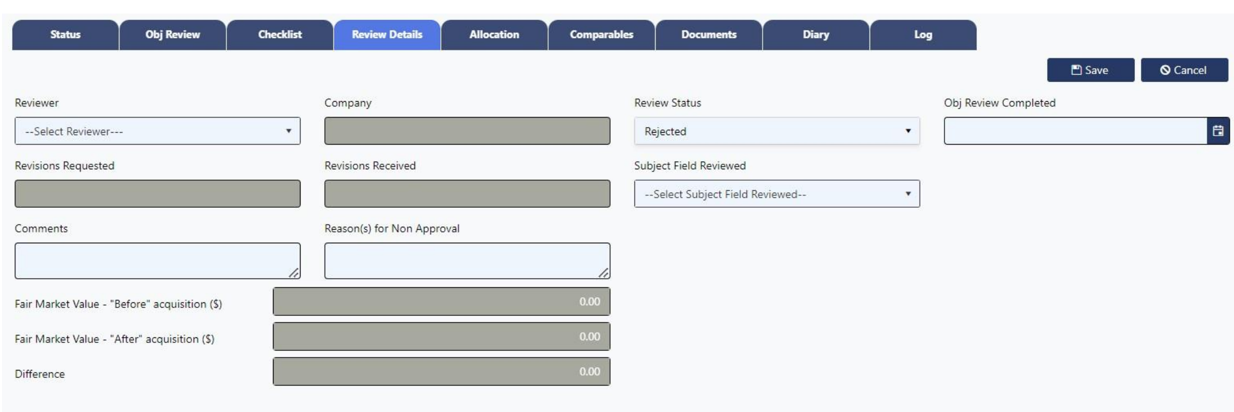
The Fair Market Values are read only and entered in the Allocation tab. Revisions Requested and Revisions Received will show up the latest date based on Comments/Diary items added in the Log where SubType is Revisions Requested and Revisions Received respectively. Based on the appraisal review the review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



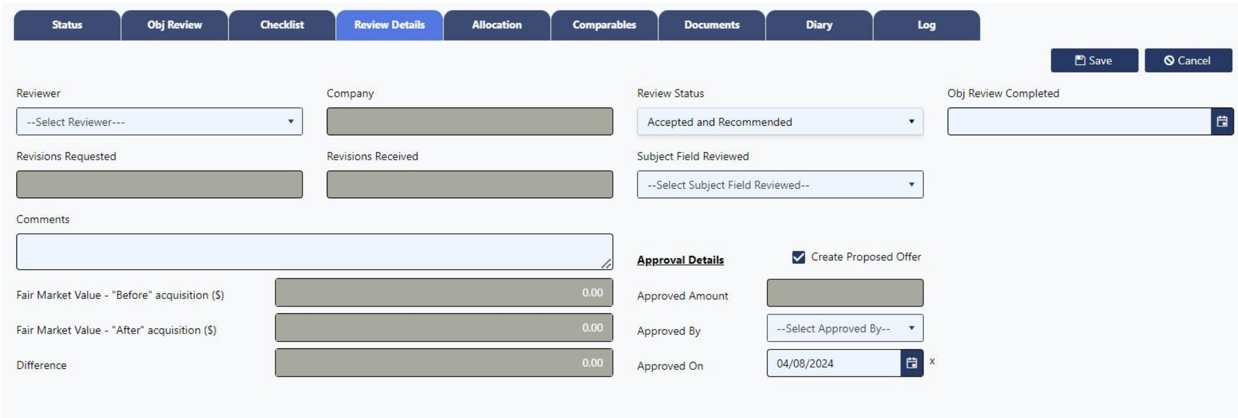
If Review Status is Accepted (Not Recommended) a field will show up allowing you to enter the Reason for not recommending the appraisal



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



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:

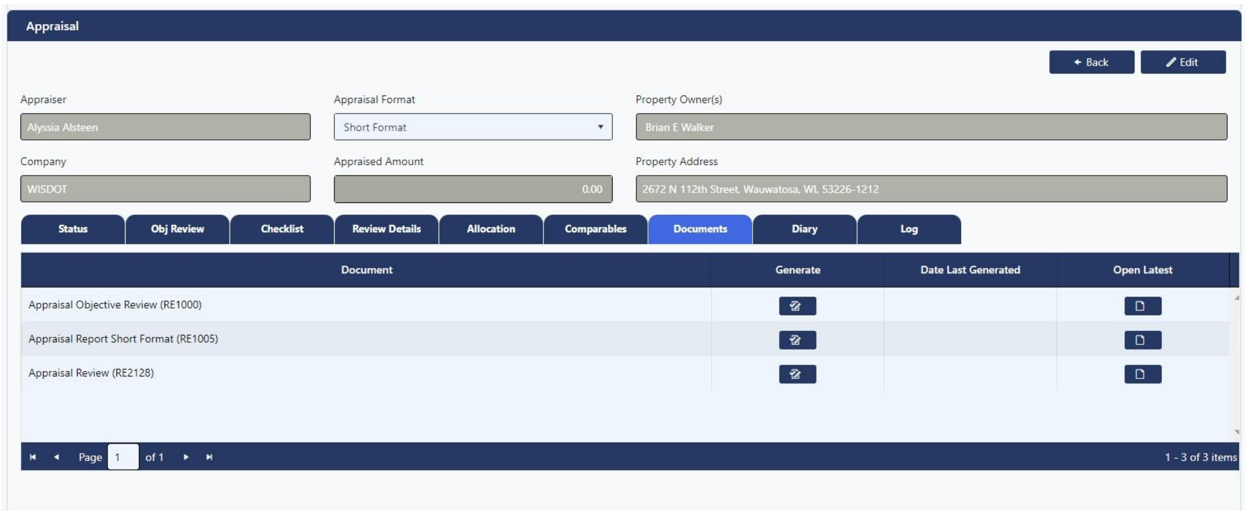
If you hit OK then an Initial Offering Price record gets created in the Offer/Negotiations section, if you do not wish to create an initial offer then hit the Cancel button

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:

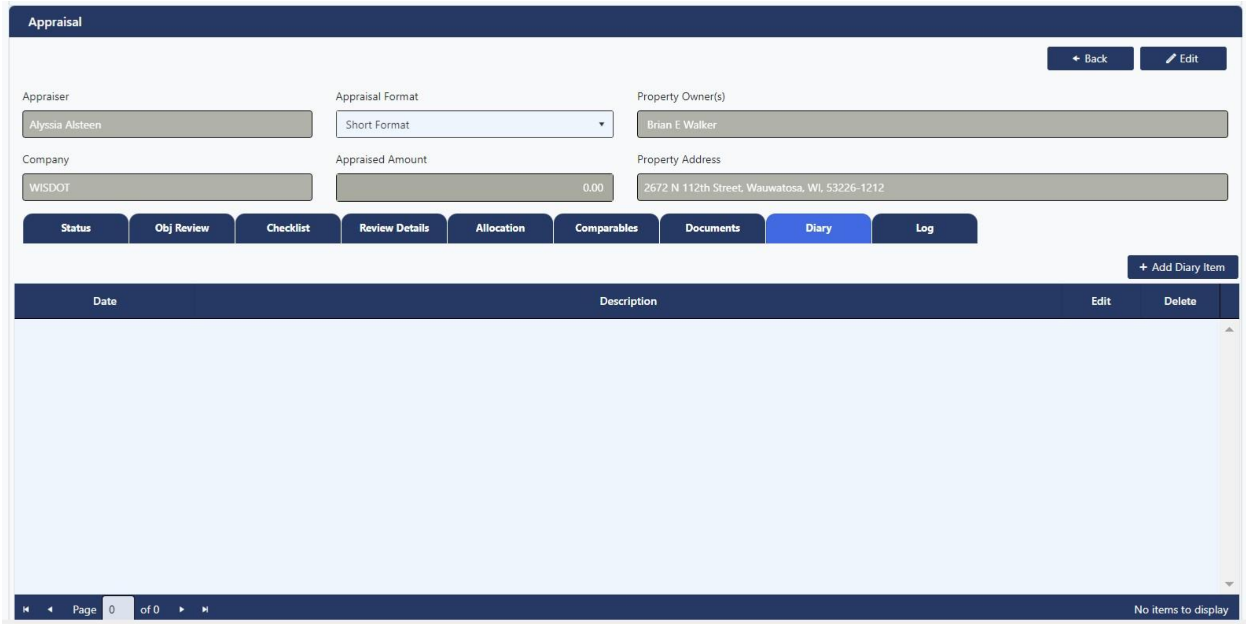


You can generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Appraisal Log. The next time you open the Documents tab, the table will be updated with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

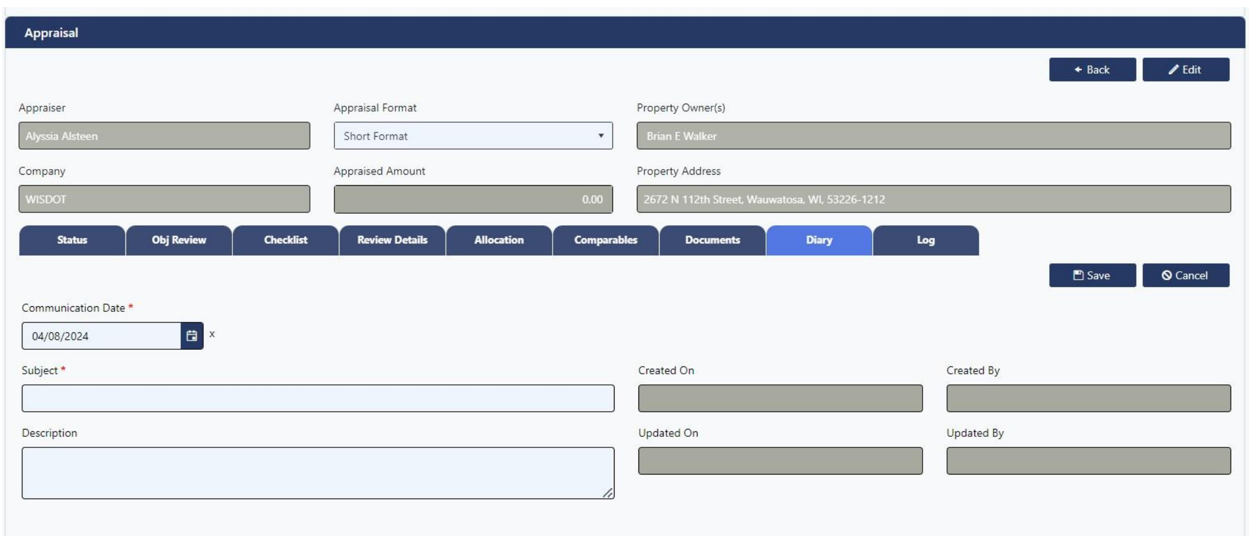
Please refer to Section 5.5 for further details about generation and upload of modified documents within the system.

7.6.9 Diary Tab

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



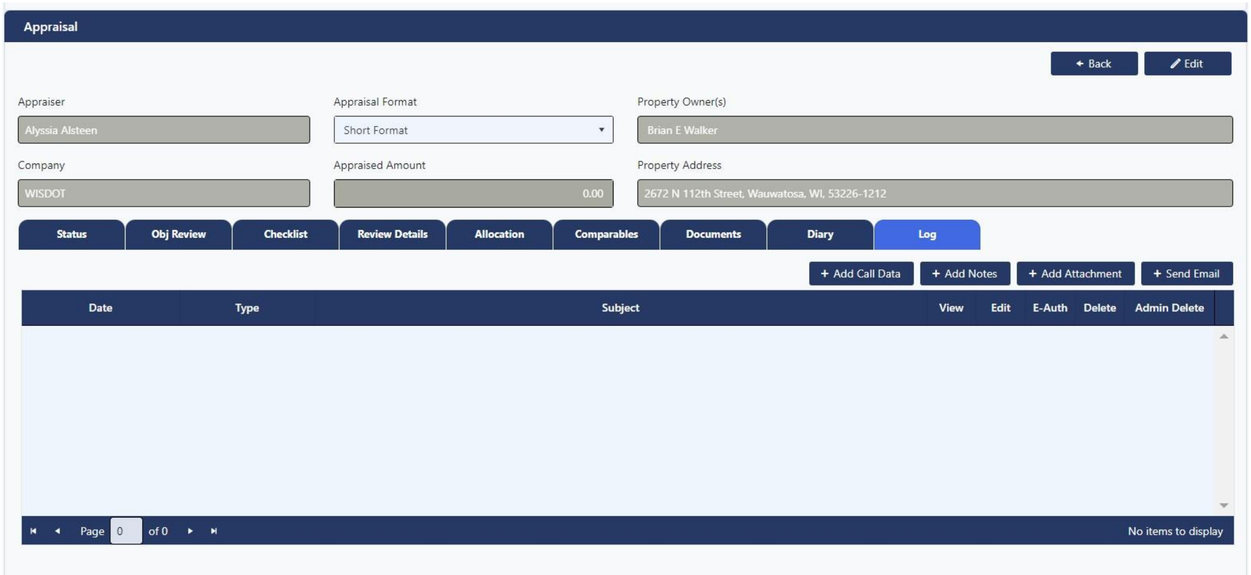
To add a Diary item, click the Add Diary Item button and the following screen will open:



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

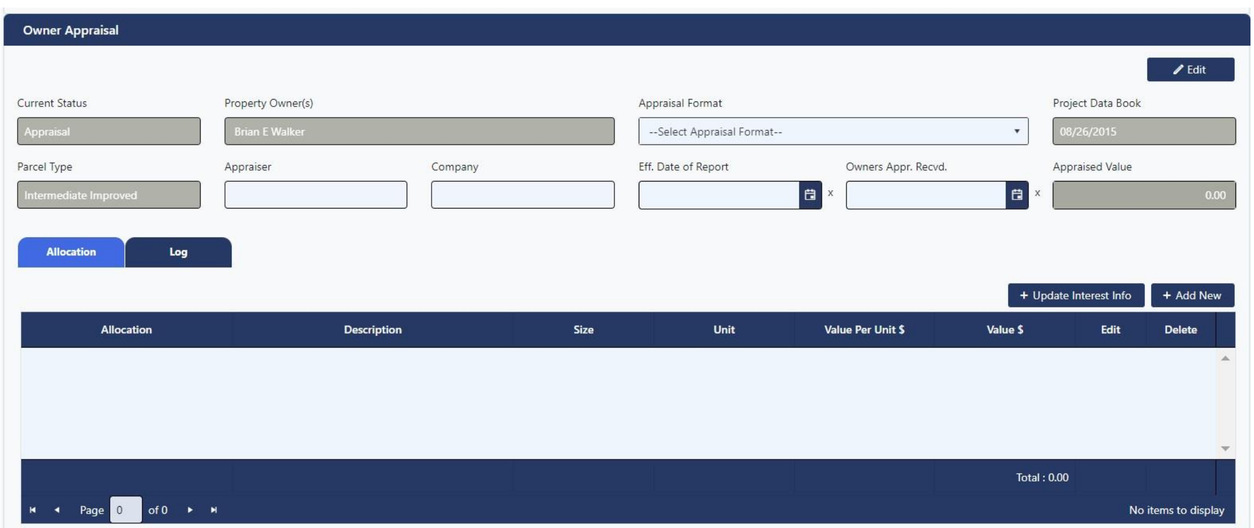
To access the Appraisal Log for a parcel, click on the Log tab. The following screen on the bottom portion of the page will open:



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:



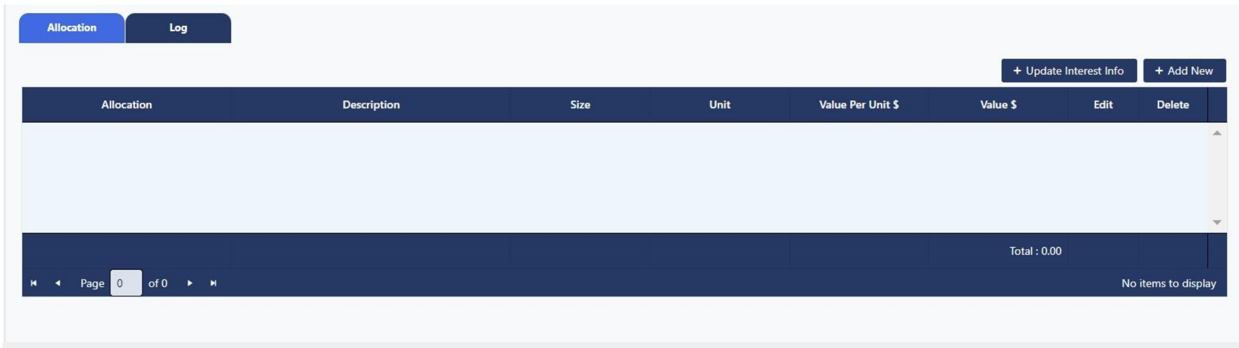
You need to specify the Owners Appraiser name, the company name and the appraisal format for the owner's appraisal.

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 open up by default on the Owners Appraisal screen and the following screen will show up:



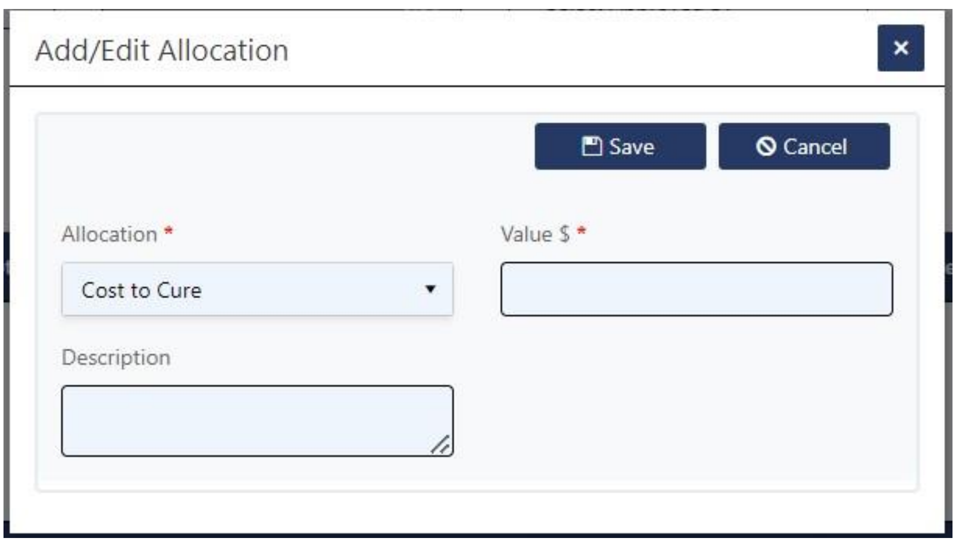
In order to populate the allocation table with the information from the Interests screen please click on Update Interest Info button. Clicking on this button will show the following popup:

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.

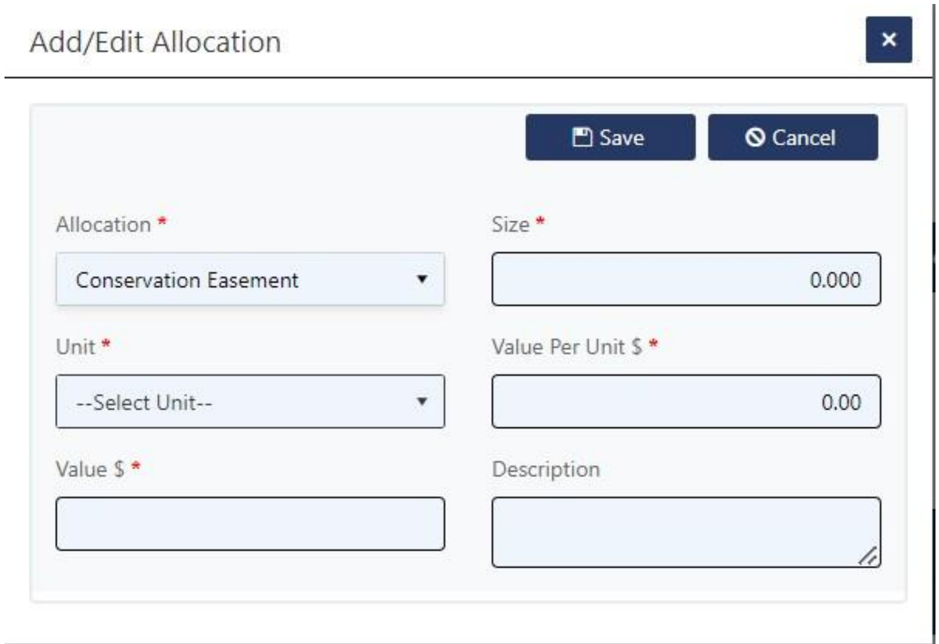
You are required to enter a per unit value, the total value or change the unit type for each type of allocation entered on this screen.

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:

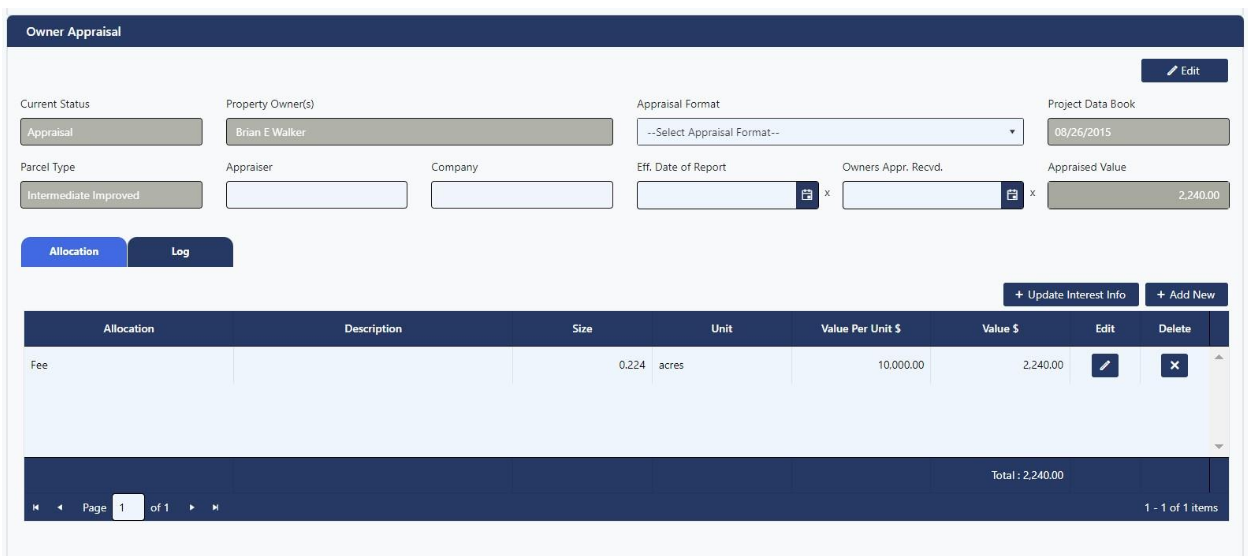


You can also add other interest types entered on the Interest screen and the following fields show up allowing users to enter a size and a per unit value:



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.

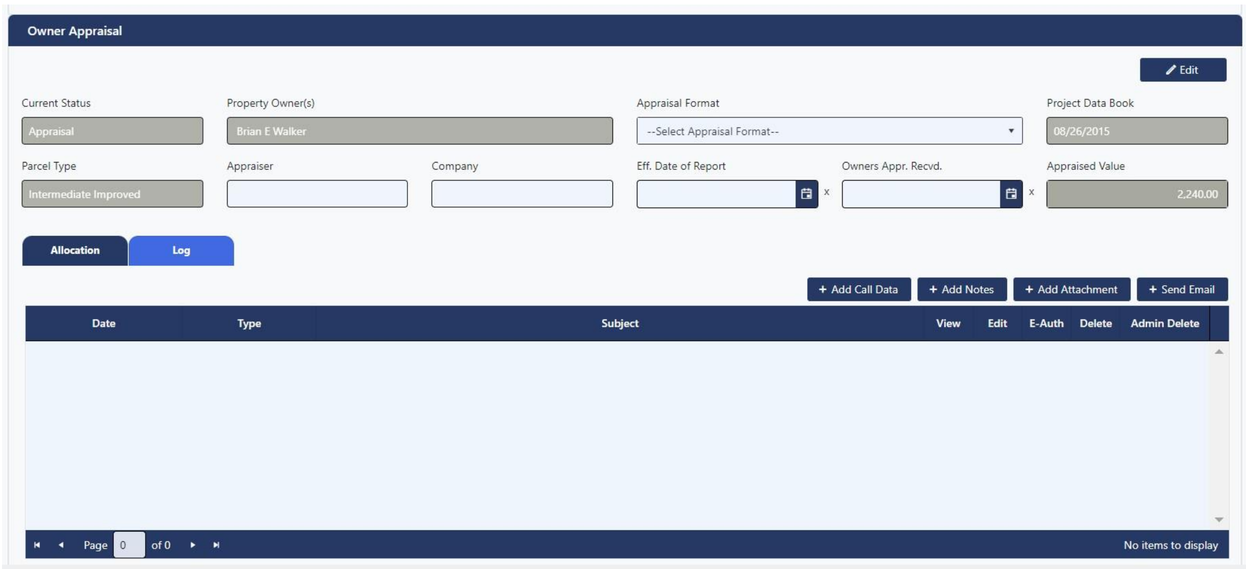
Once you are done entering allocations within the Allocation tab you will see a screen as below:



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

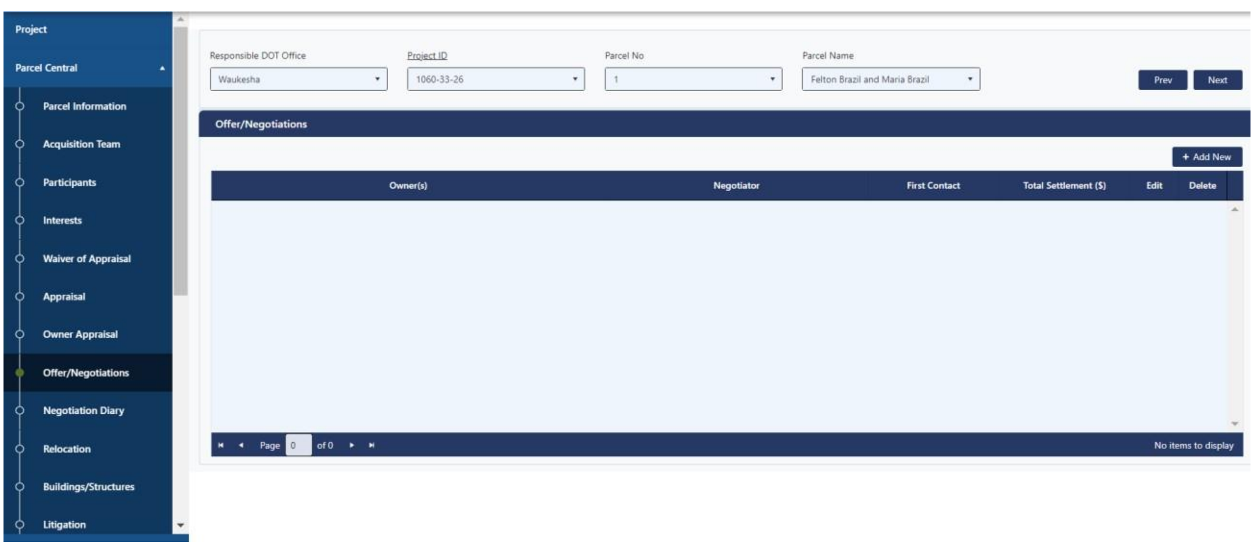
To access the Owners Appraisal Log for a parcel, click on the Log tab. The following screen on the bottom portion of the page will open:



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:

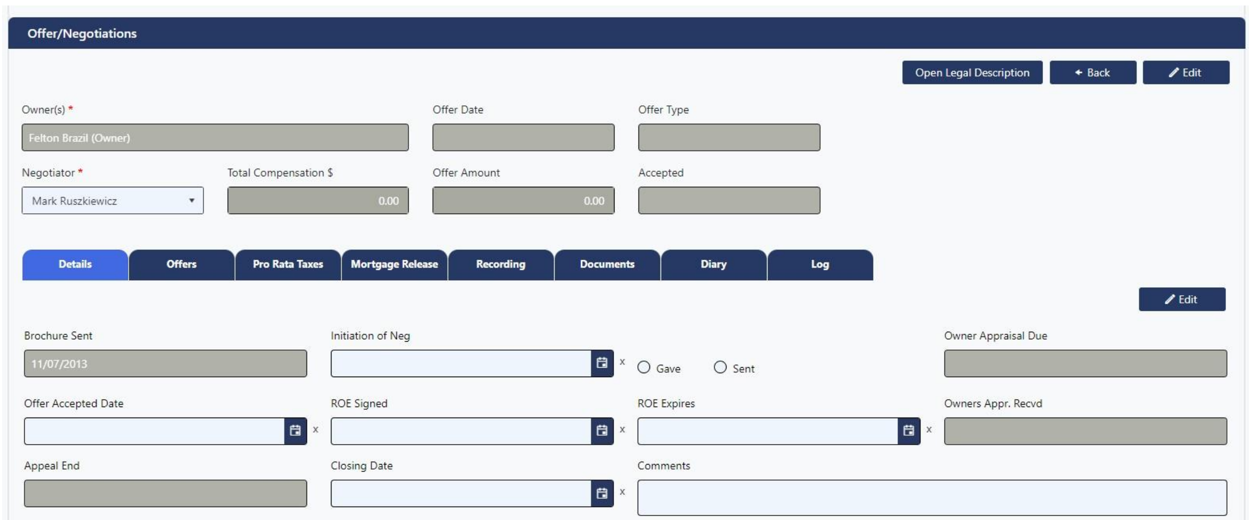


If an initial offer was created from the Waiver of Appraisal screen (Section 7.5) or from the DOT Appraisals screen (Section 7.6) the Negotiation record will automatically show up on the screen

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:

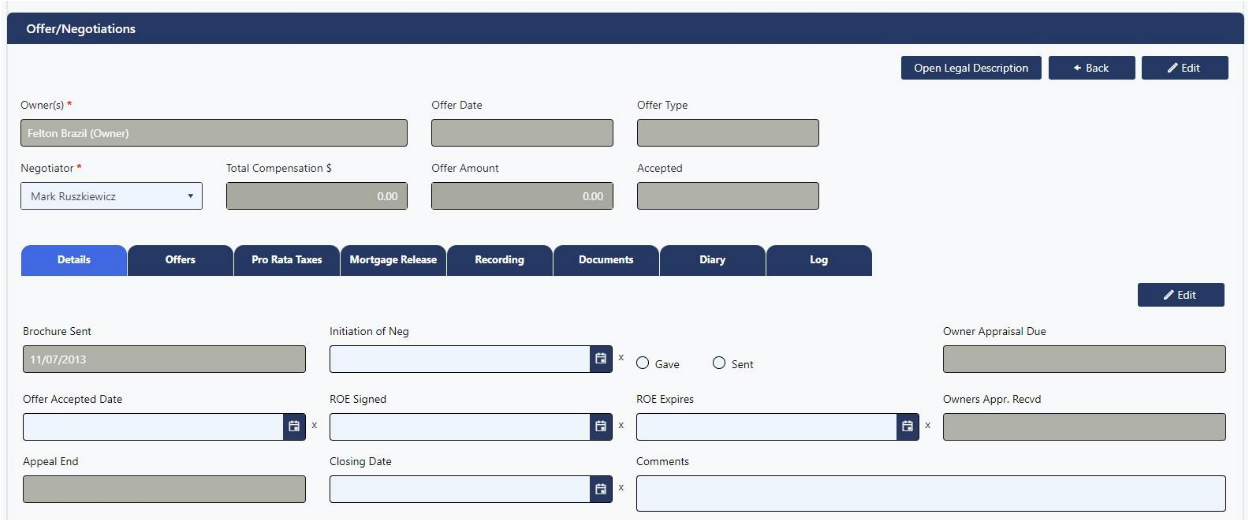
Please select the Owner from the dropdown list of participants. Also select the Negotiator. If a Negotiator is not assigned to the Parcel please go to the Acqusition team or Projects – Role Assignments tab to assign a Negotiator for this parcel. The Offer related fields are readonly fields and will be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



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:



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.

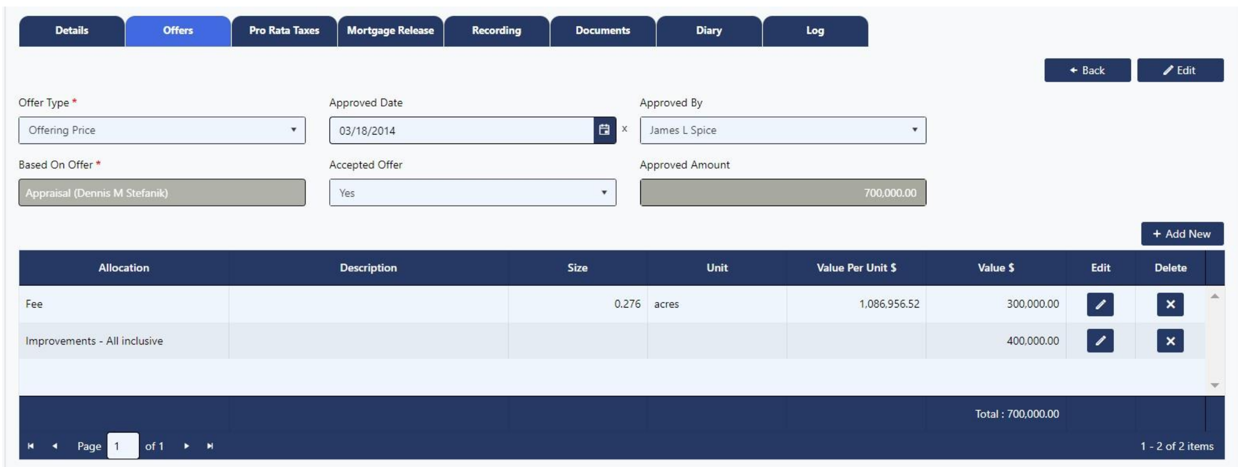
7.8.2 Offers

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.

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:

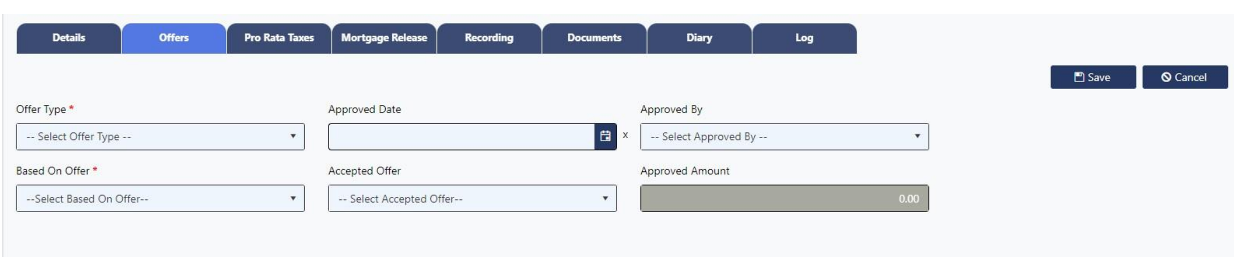


You can make minor modification to the allocation within the Allocation tab. The Allocation tab functionality works the same way as the Allocation tab within Waiver of Appraisal (Section 7.5) or DOT Appraisals (Section 7.6)

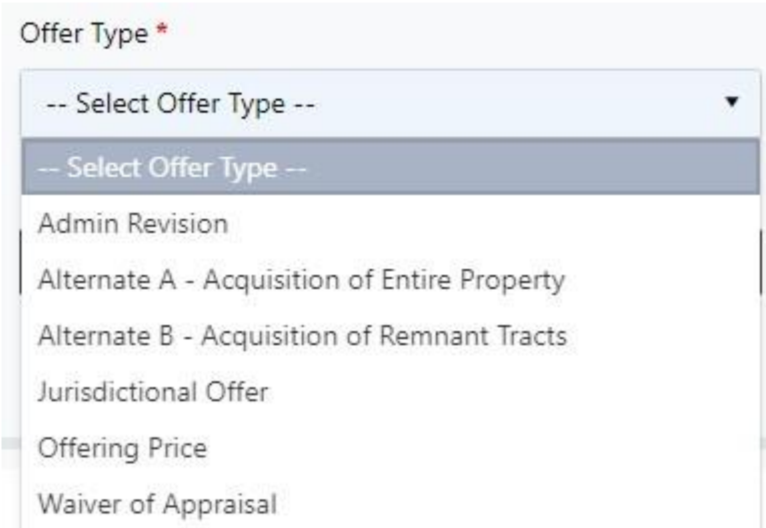
If the information has already been entered and you need to change something, click the edit button at the top of the screen and then click the save button. If you do not wish to save the changes, click the cancel button.

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:



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



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

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 select 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.

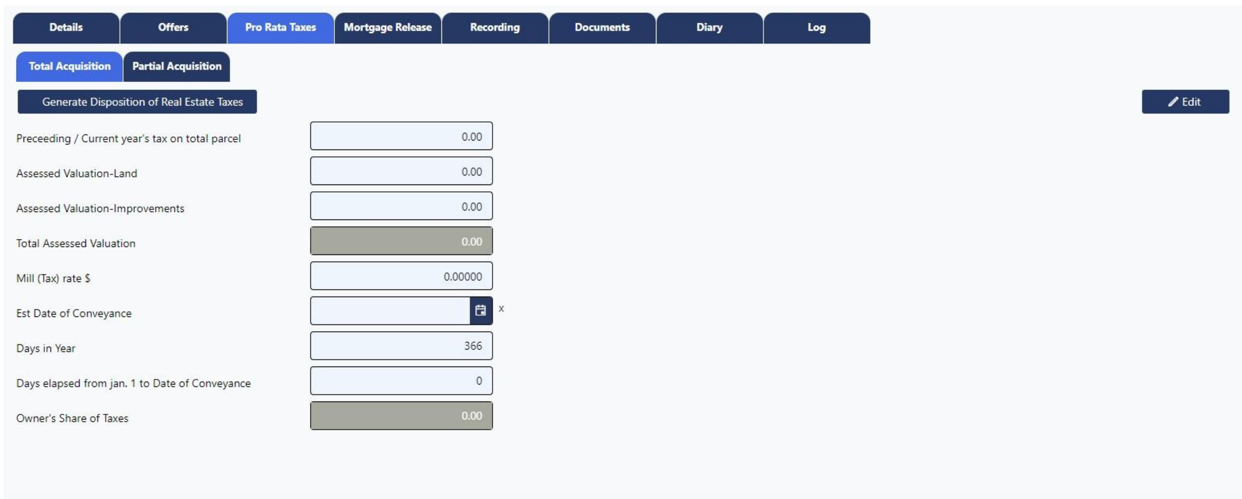
7.8.3 Pro Rata Taxes Tab

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.

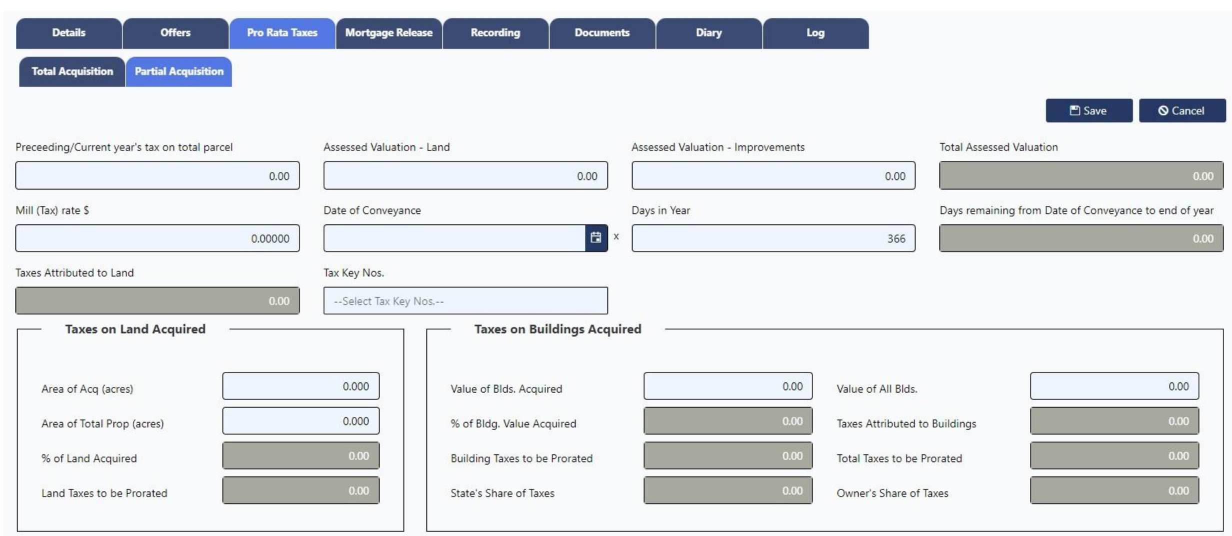
Once the tax calculations are done you can generate the disposition of real estate taxes document by clicking on the Generate Disposition of Real Estate Taxes button. The generated document will automatically get inserted into the Log (Section 7.8.5).

7.8.3.2 Partial Acquisition

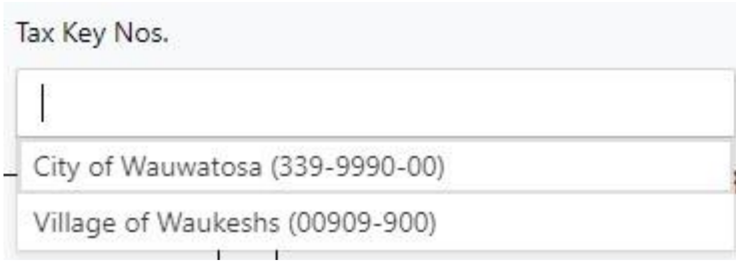
If you select to calculate taxes for Partial Acquisition click on the Partial Acquisition tab the following screen will open:

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:



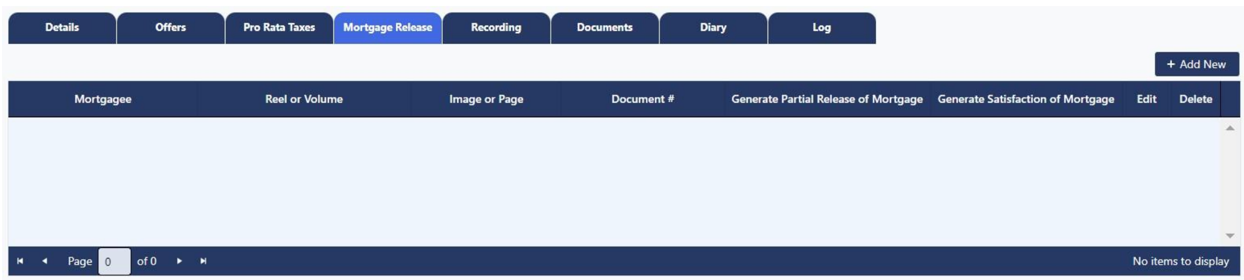
Please enter appropriate values on the screen, use the scroll bar to scroll down to select the tax key nos that you are calculating the taxes for:



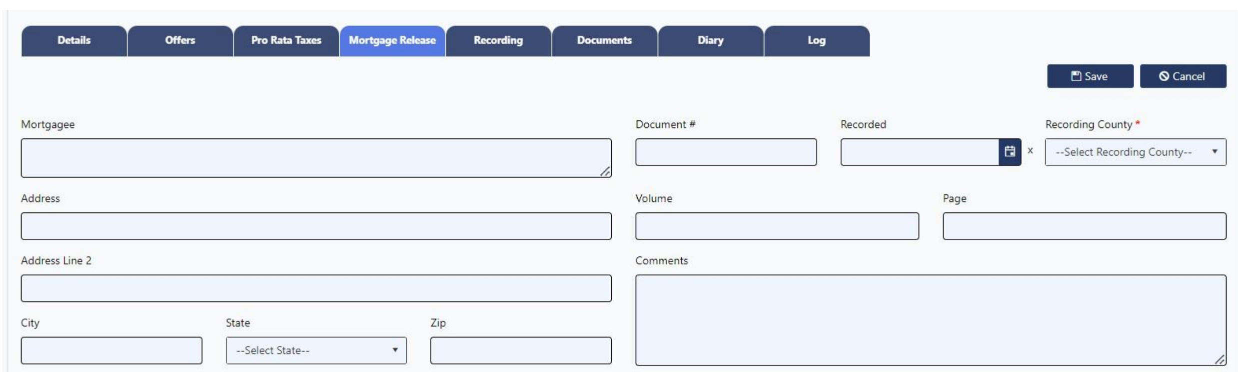
Once the calculations are entered on the screen click the save button to save the changes, or click the cancel button if you do not wish to save the changes.

7.8.4 Mortgage Release Tab

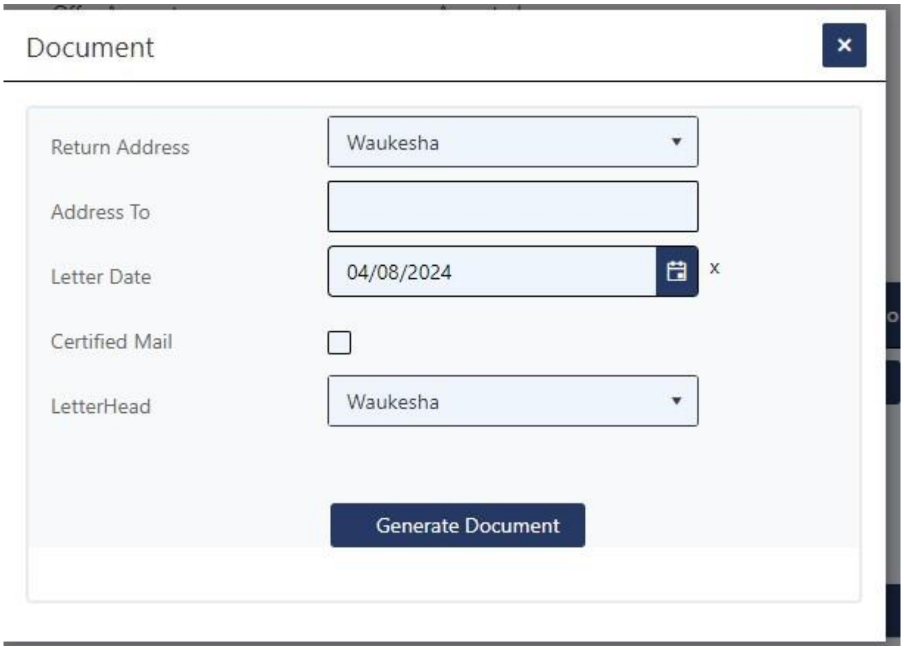
When you click on the Mortgage Release tab, the following screen will open:



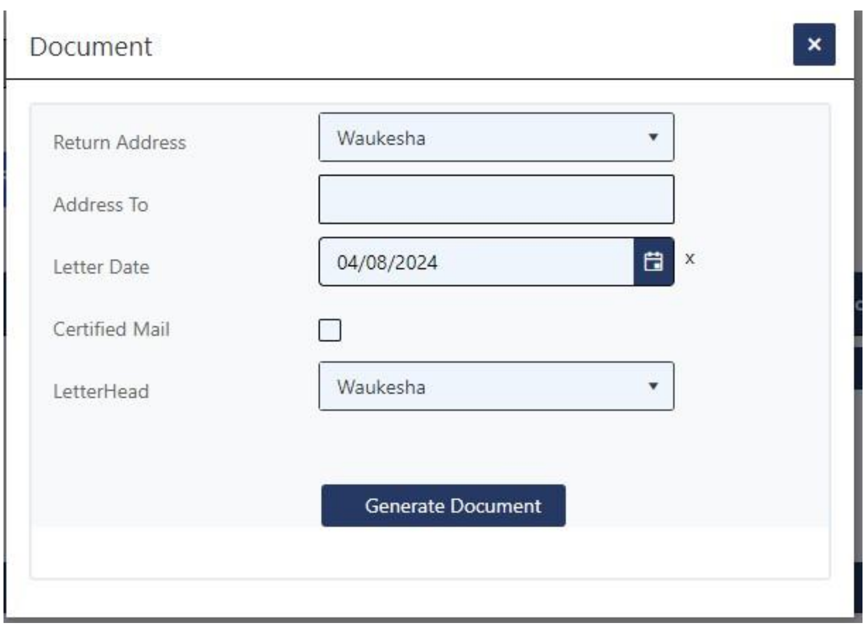
The user can click on Add New to add a new Mortgagee record and the following screen will show up:



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

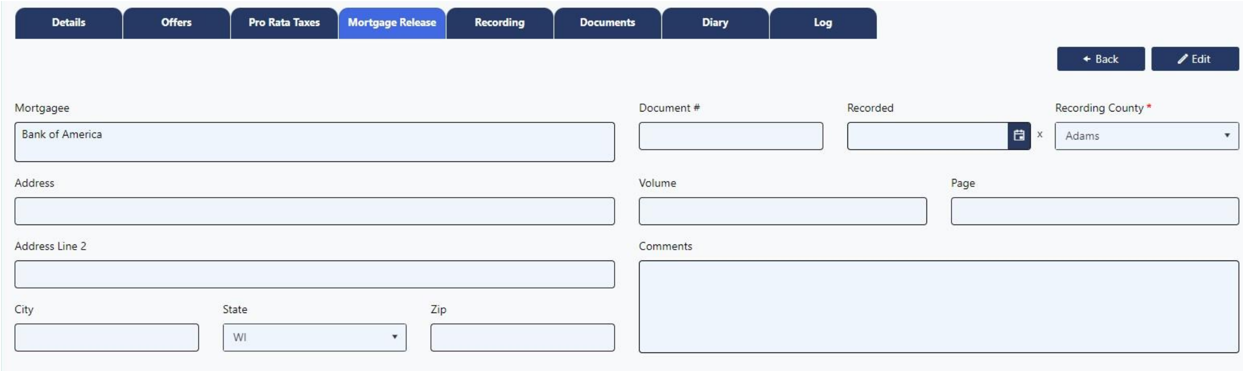


Once the document is generated you can click on the Open button to open the last generated partial release document. Similar to this you can also generate the Satisfaction of Release document by clicking on the generate button in the respective column:



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:

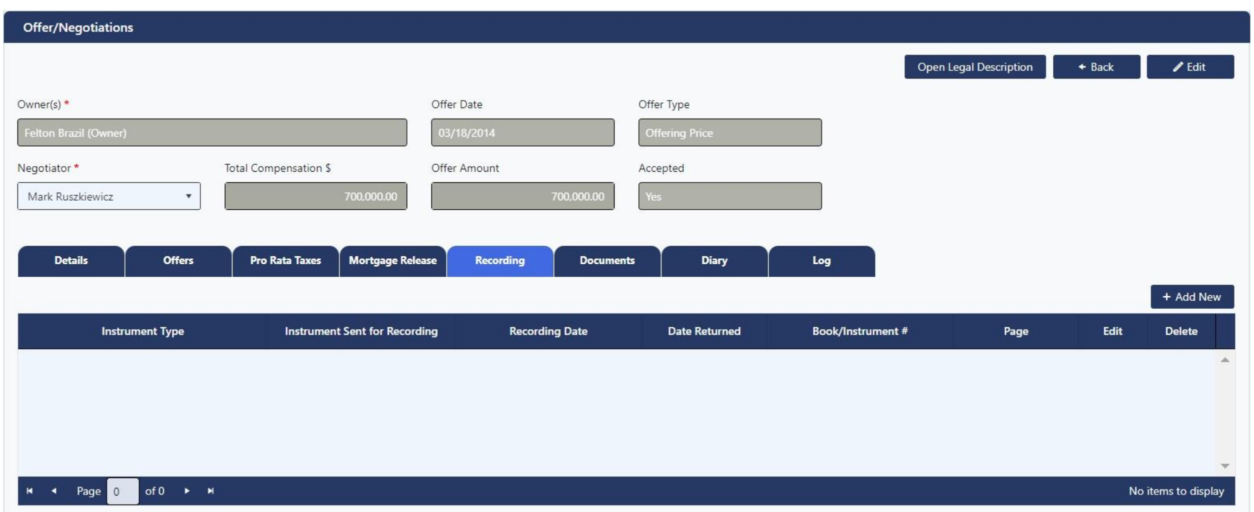


To edit this screen, click the edit button. Click the save button to save or click the cancel button if you do not wish to save. You can modify all the information on this screen.

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.

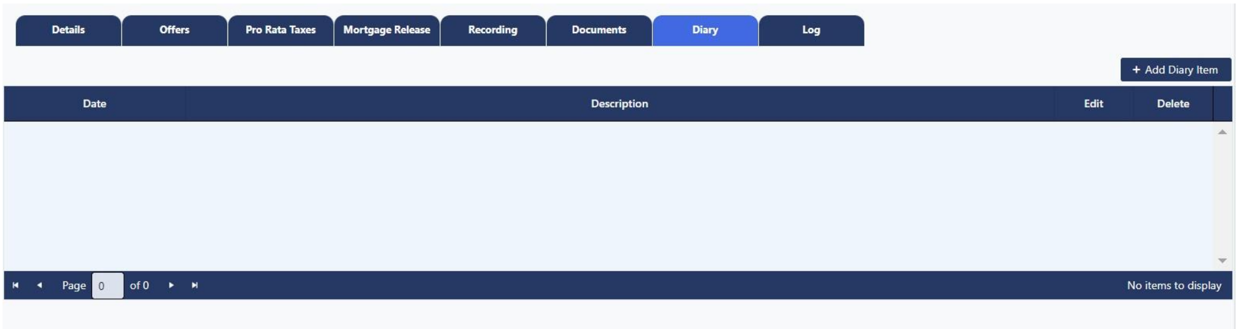
7.8.6 Documents Tab

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:

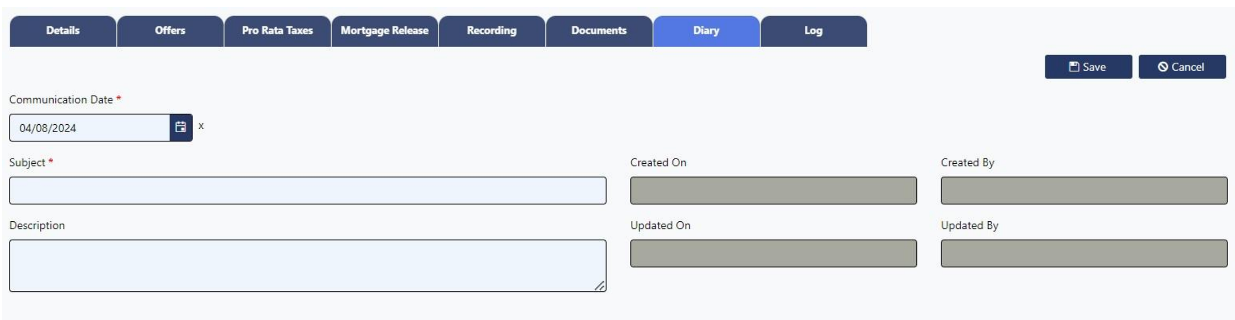
You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Negotiations Log (Section 7.11.9). The next time you open the Documents 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:



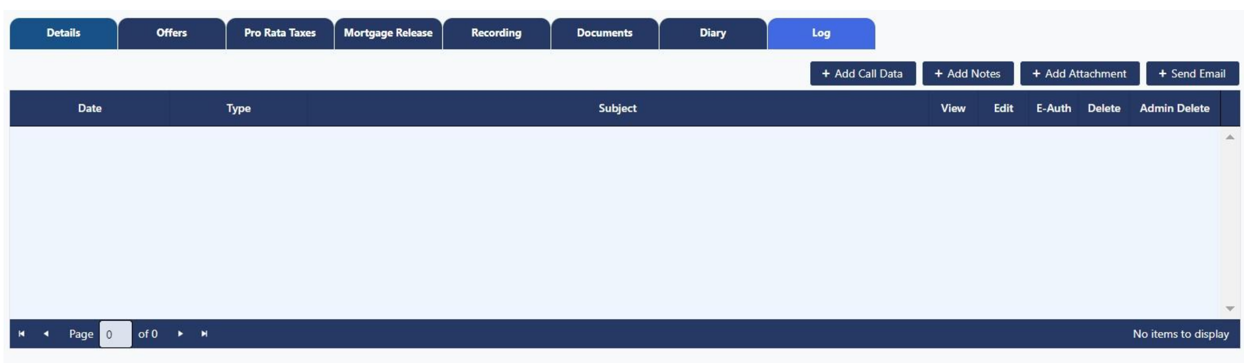
To add a Diary item, click the Add Diary Item button and the following screen will open:



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

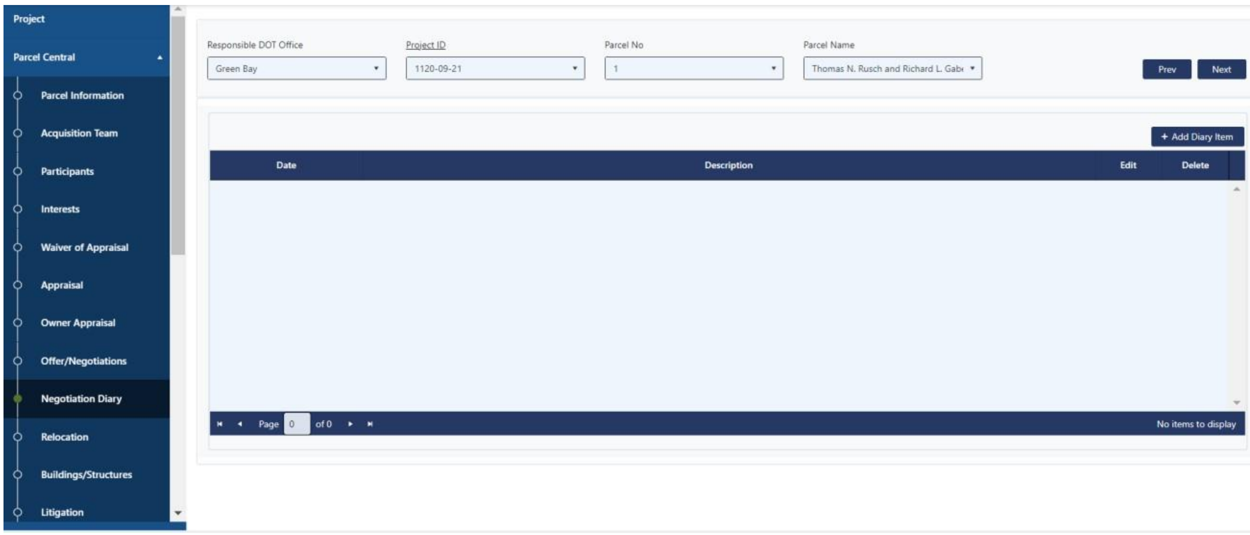
When you click on the Log tab, the following screen will open:



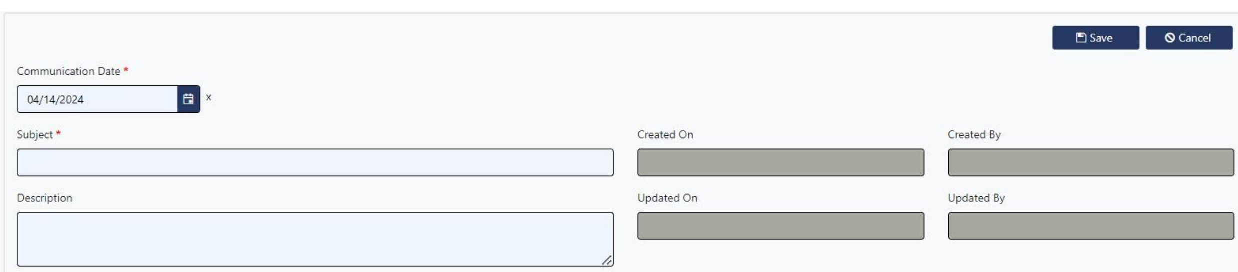
Details of the log are described in Section 5 of this manual. However, one very important aspect of the log for the negotiations process is entering Negotiation Diary Items by clicking the button. The Diary is a description of all contact with the property owner or their representative during the negotiation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



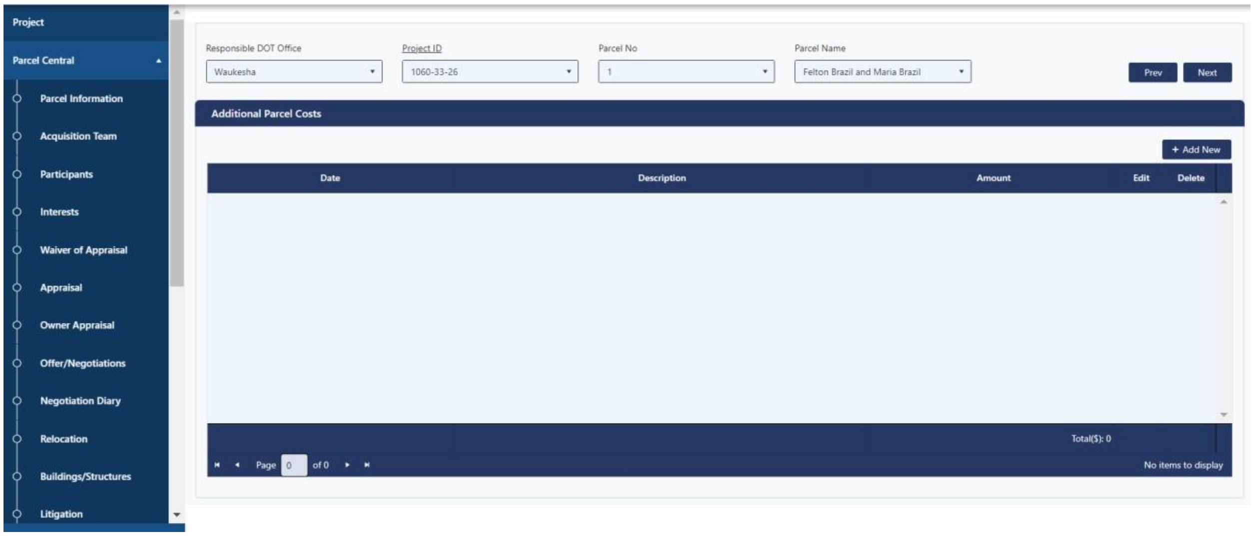
You can access this menu item independently and will always open a new window allowing you to enter negotiation diary items no matter which screen you are currently on. To add a Diary item, click the button and the following screen will open:



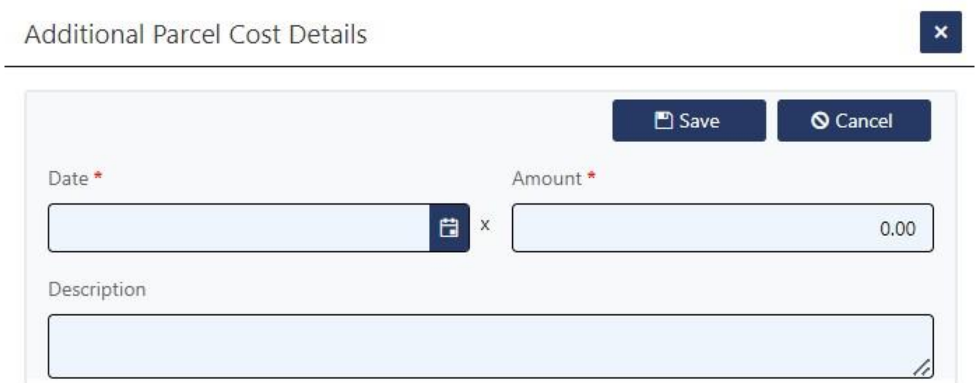
Enter the requested fields. When you are done entering the data, click the save button. If you do not want to save, click the cancel button. The Diary is then saved in the Log (Section 7.11.9). To view or edit a Diary in the table, click the edit button in the applicable row.

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:



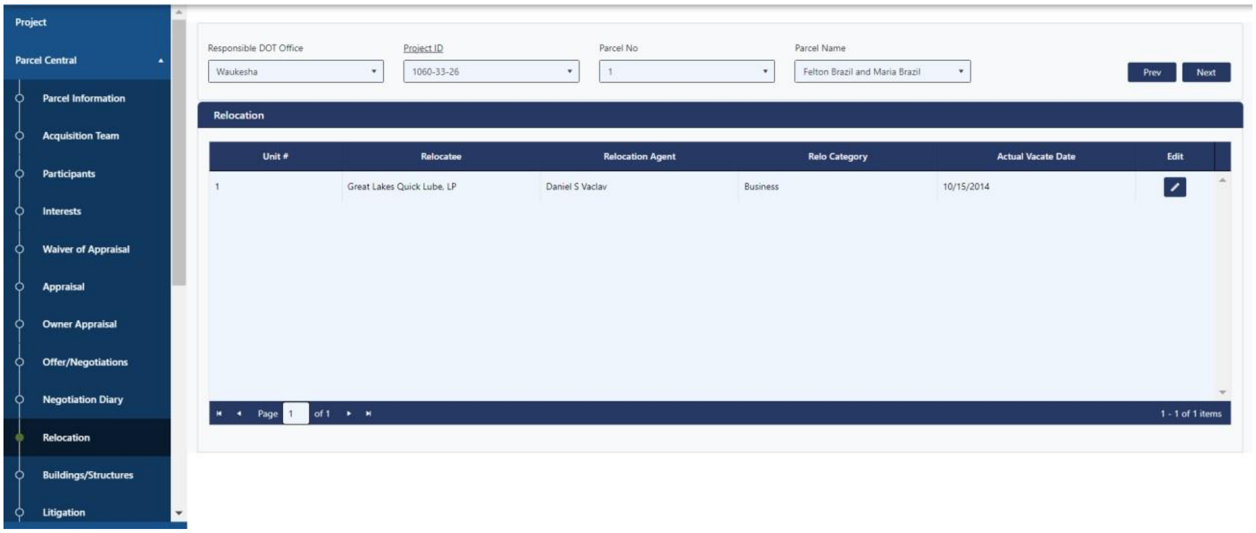
This will show list of additional parcel costs added for the parcel. You click on the edit button to view the details of an existing parcel cost added, click on the delete button to delete an additional parcel cost already added. When you click on Add New to add a new parcel cost the following will open:



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.

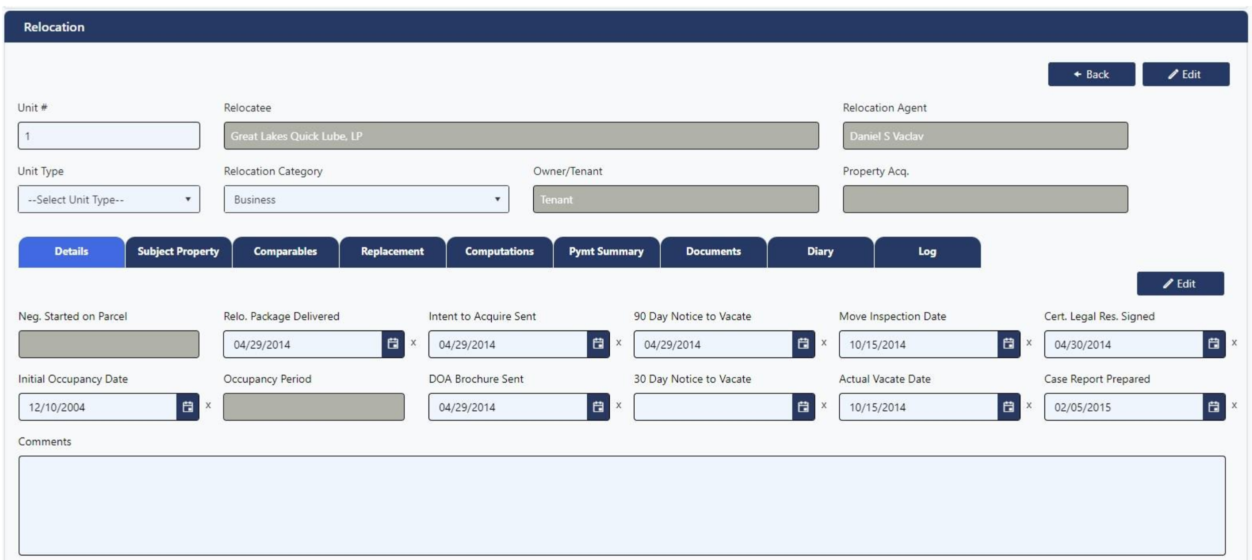
7.11 Relocation

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.

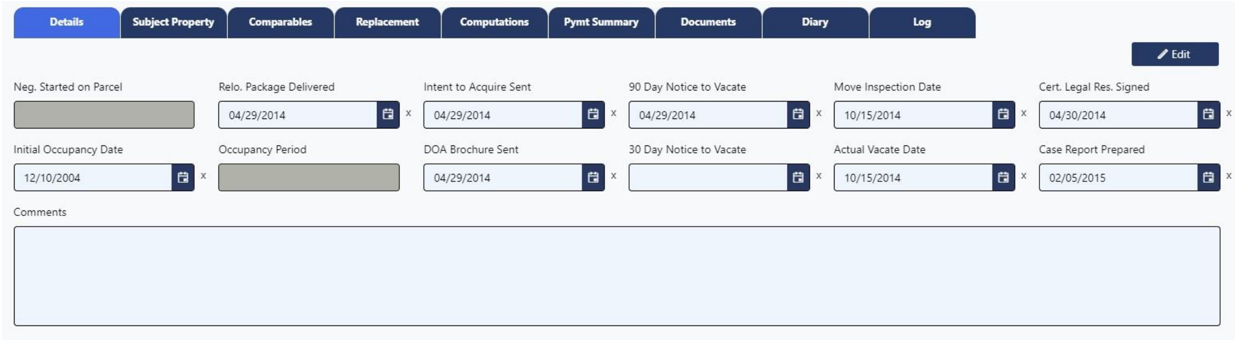
To view the details for a relocatee, click the edit button in the row of the desired relocatee.



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

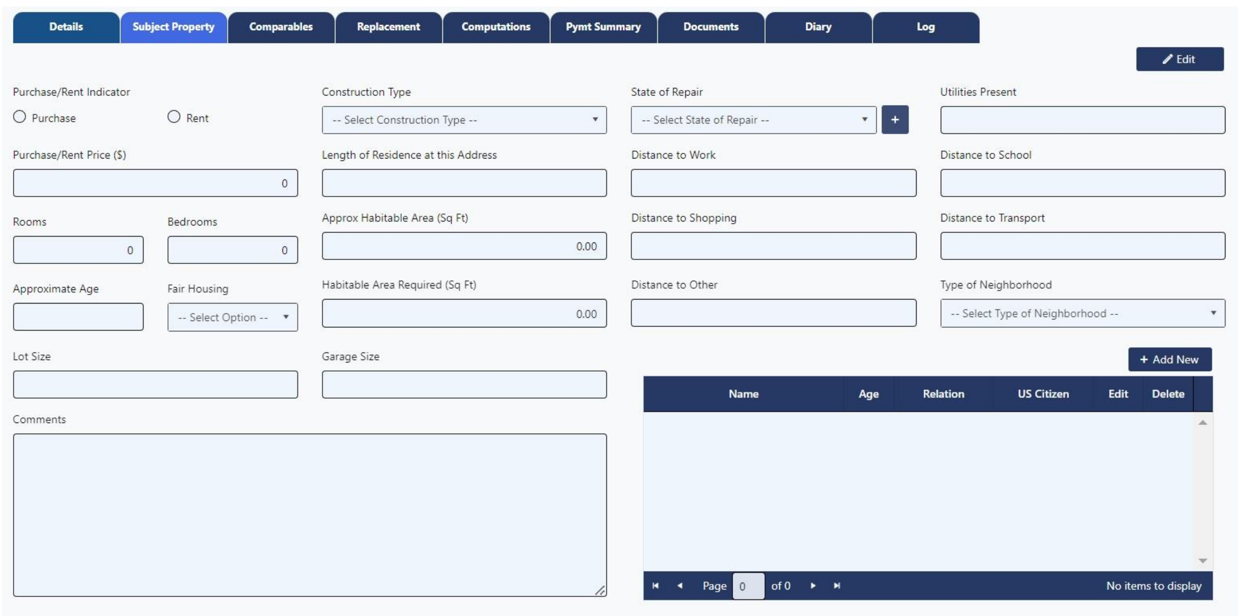
When you edit the existing relocatee it shows the Details tab by default, the following screen will show up:



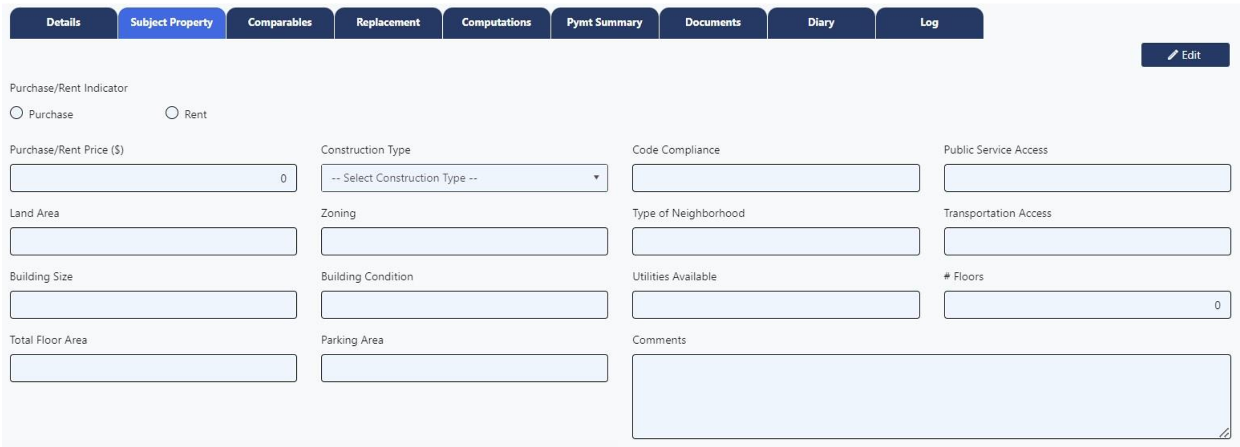
To make changes, click the edit button within the Details tab. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

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:

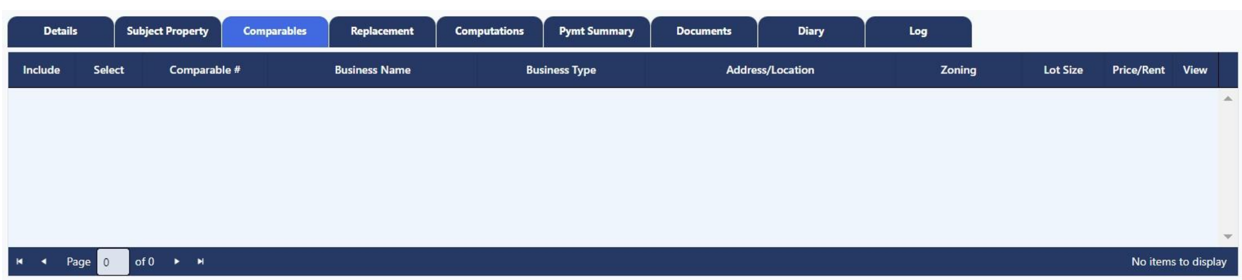


To make changes, click the edit button within the Subject Property tab. You can select Purchase or Rent. If you select Purchase, the Acquisition Amount will be read only, which is populated from the Offer/Negotiation screen. If you select Rent, the Rent Amount can be filled in by the agent. Once you 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.

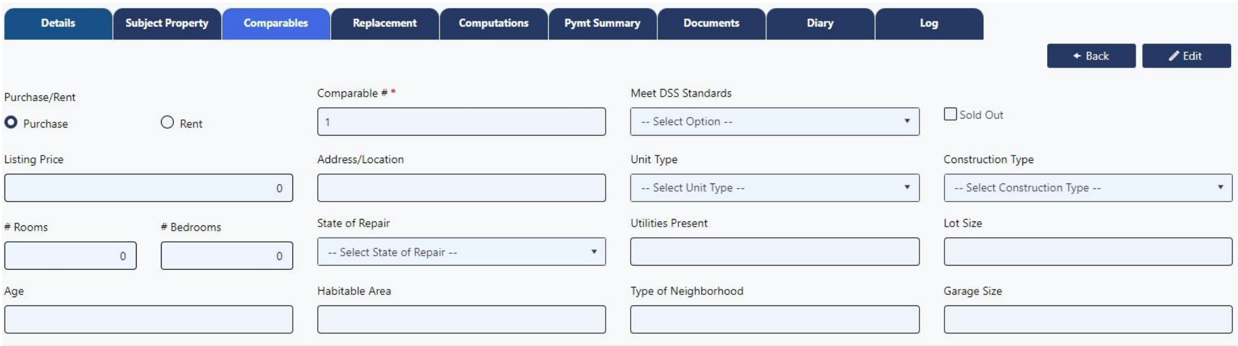
7.11.2 Comparables Tab

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



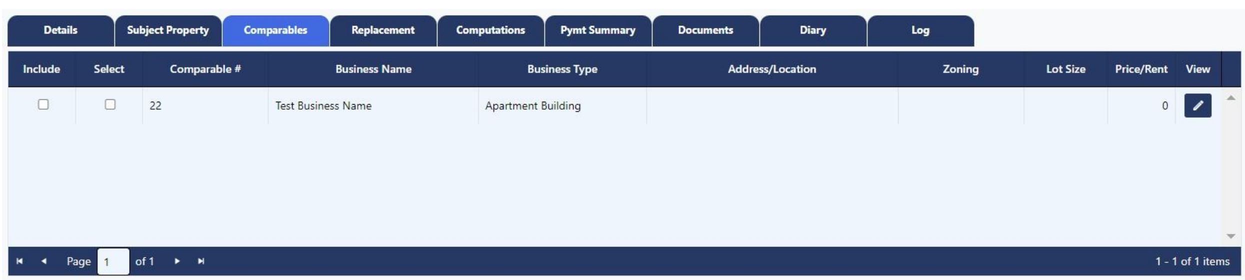
To add a relocation comparable, please go to the Projects- Relo Comps screen,

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

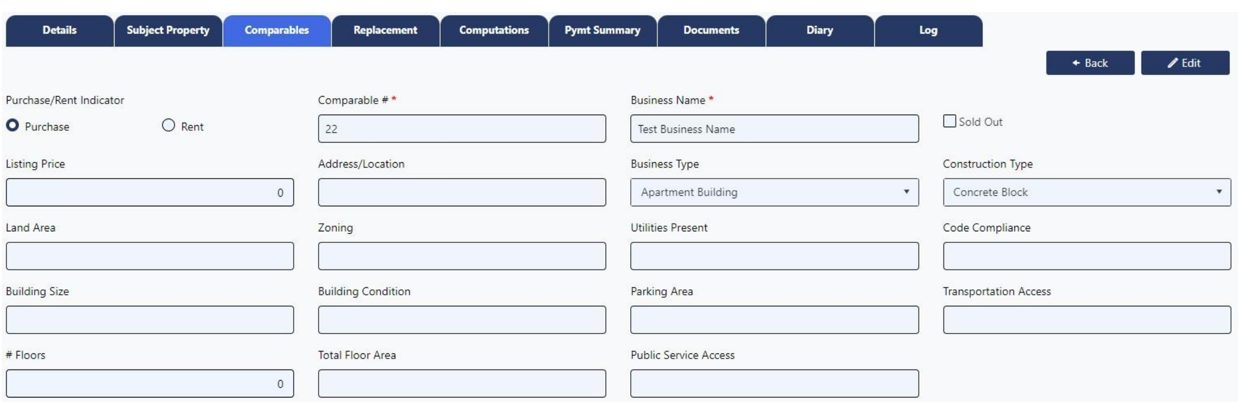


You can make changes or additions. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button. If you wish to include the comparable, click the Include box in the comparables table. You can choose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



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:

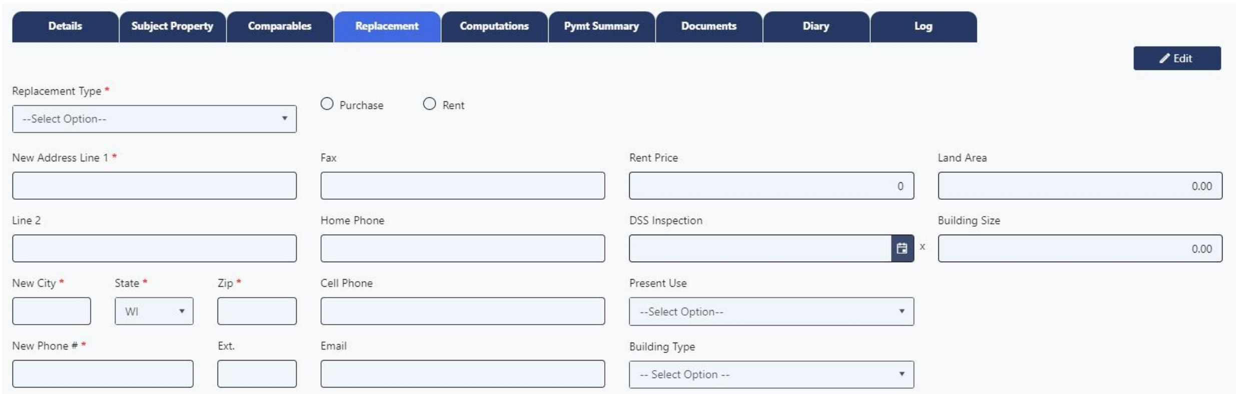


You can make changes or additions. Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button. If you wish to include the comparable, click the include box in the comparables table.

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.

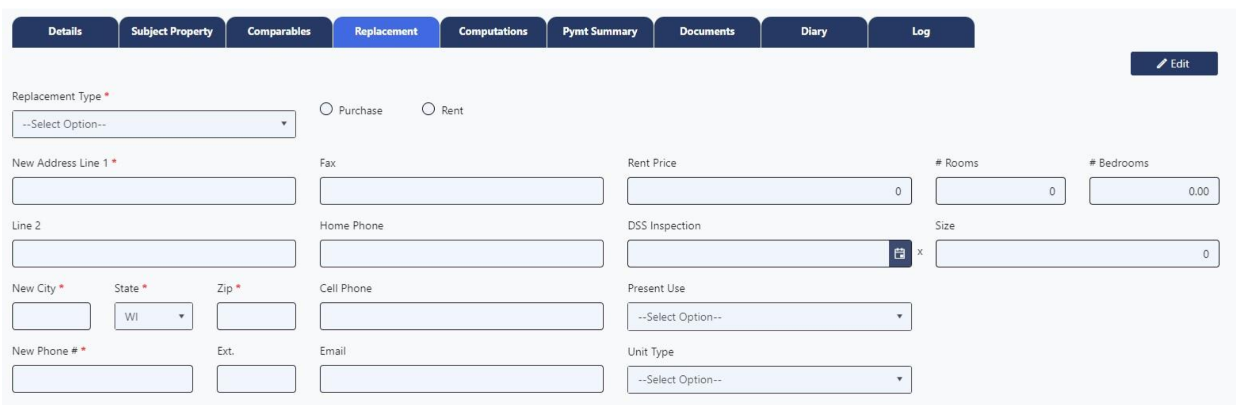
7.11.3 Replacement Tab

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:

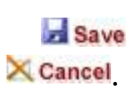


To enter or edit the data, click the edit button within the Replacement tab. Enter the data and then click the save button to save you changes. If you do not wish to save the changes, click the cancel button.

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



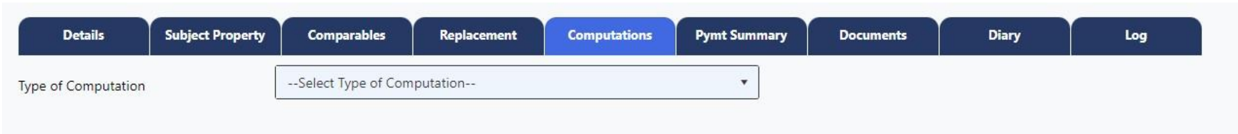
To enter or edit the data, click the edit button within the Replacement tab. Enter the remaining data and then click the save button to save you changes. If you do not wish to save the changes,



. click the cancel button

7.11.4 Computations Tab

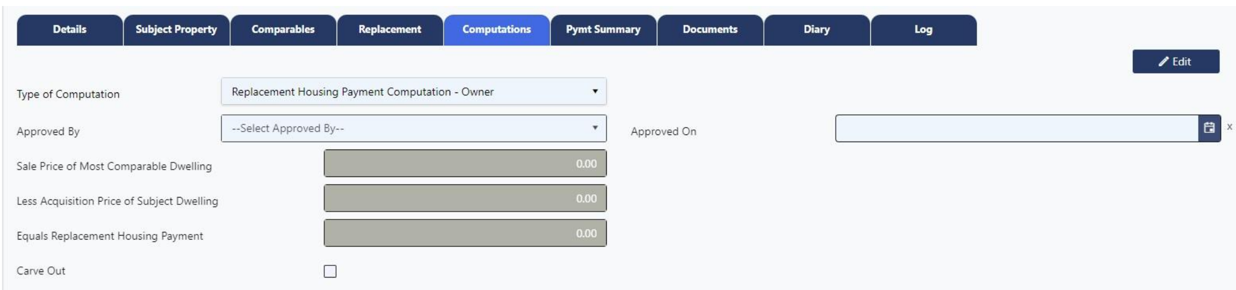
When you click on the Computations tab, you will see the following field with a dropdown menu:



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

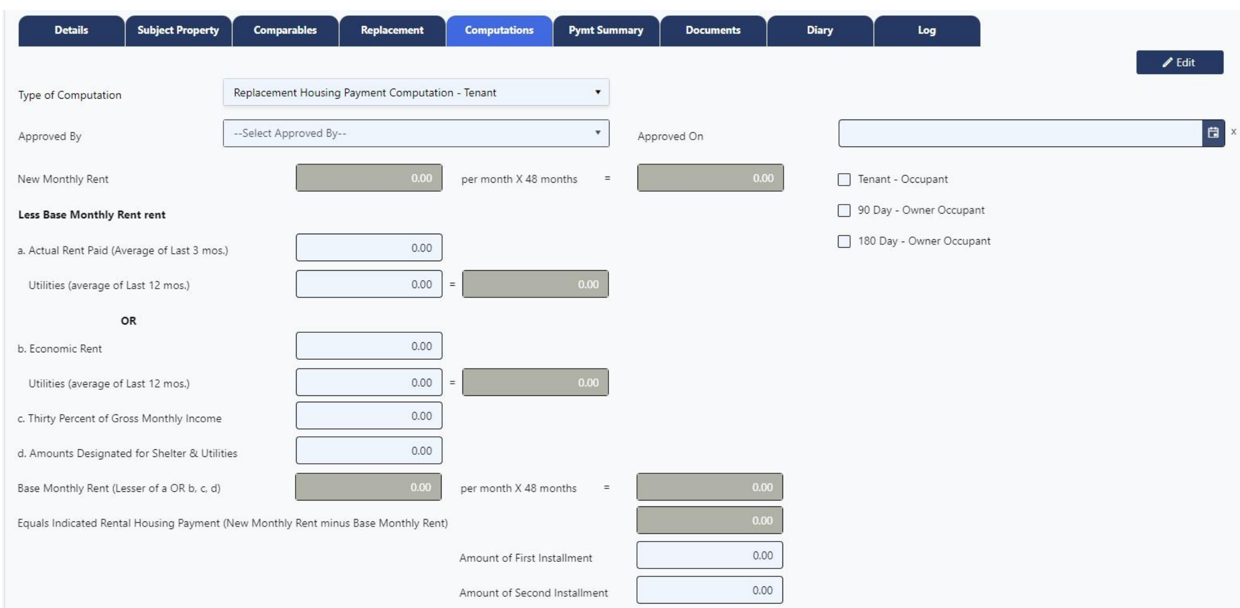
For a residential relocatee owner, when you choose the Replacement Housing Payment Computation-Owner from the dropdown, the following will open:



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

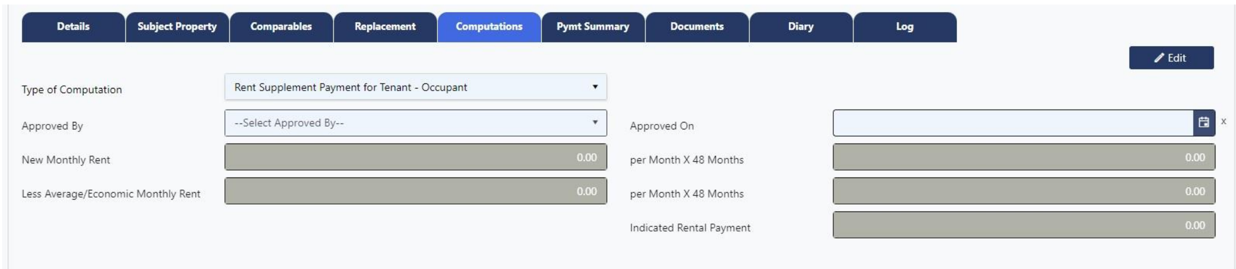
For a residential relocate tenant, when you choose the Replacement Housing Payment Computation-Owner calculation from the dropdown, the following will open:



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

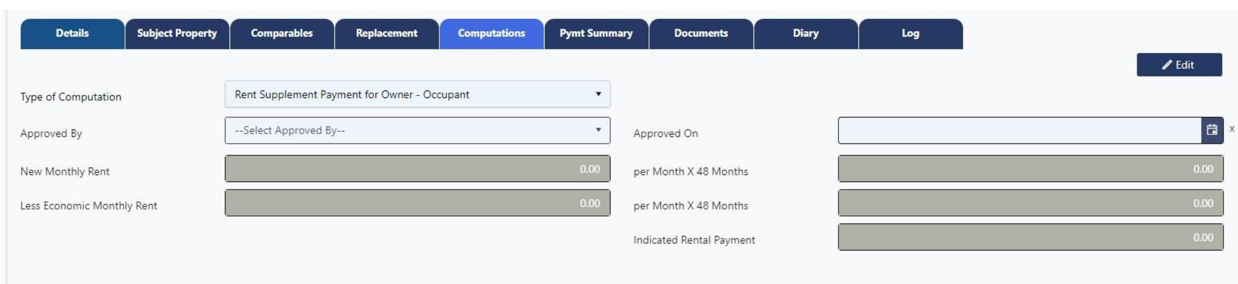
For a business relocatee tenant-occupant, when you choose the Rent Supplement Payment for Tenant-Occupant calculation from the dropdown, the following will open:



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

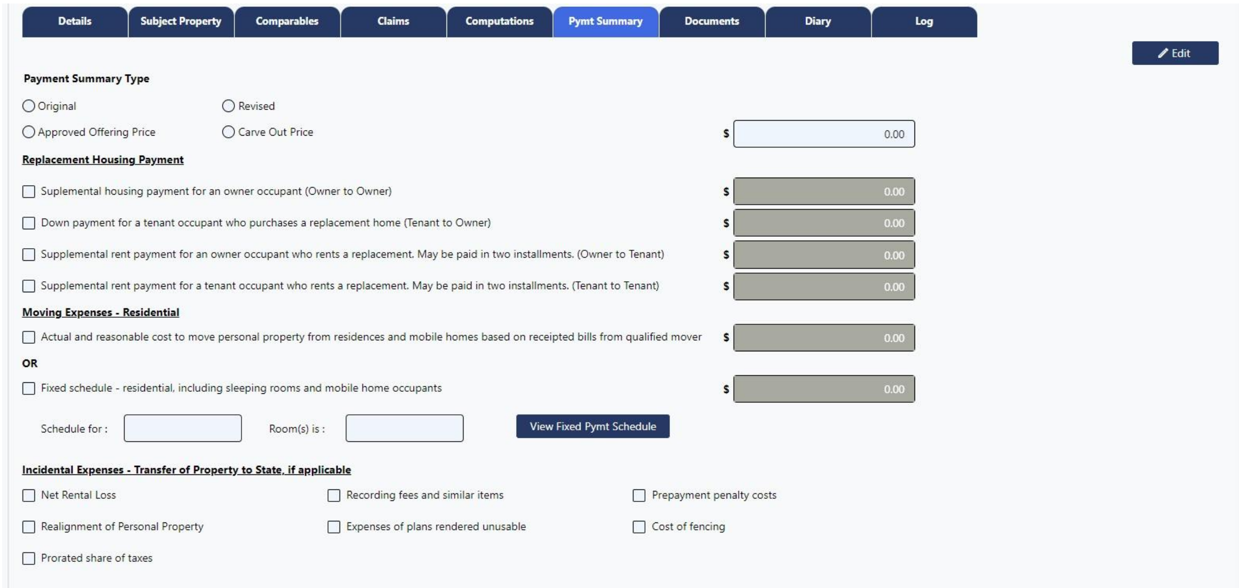
For a business relocatee owner-occupant, when you choose the Rent Supplement Payment for Owner-Occupant calculation from the dropdown, the following will open:



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:

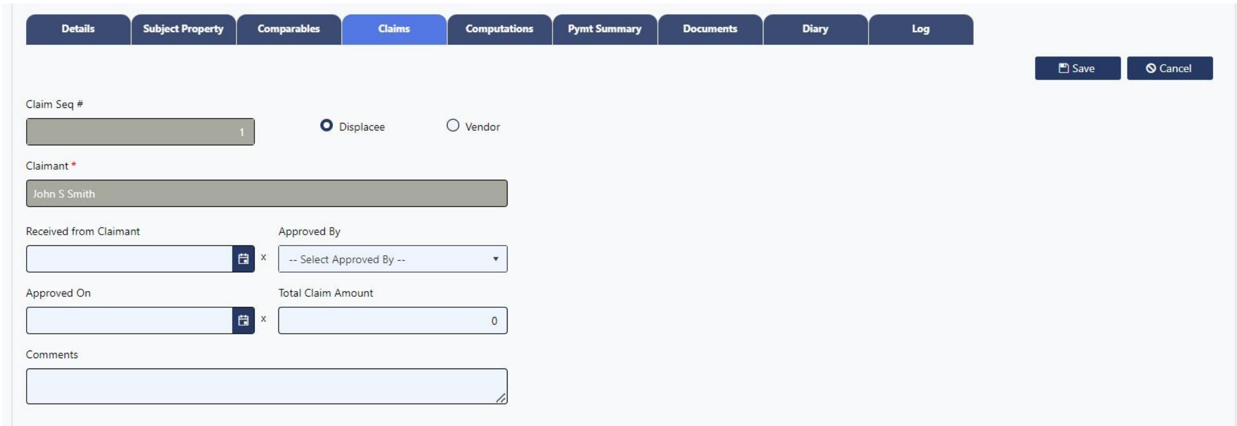


To enter the data, click the edit button. Check the boxes that apply and complete the fields that apply. To view the fixed payment schedule, click the View Fixed Payment Schedule button. When you are done entering the data, click the save button. If you do not want to save, click the cancel button.

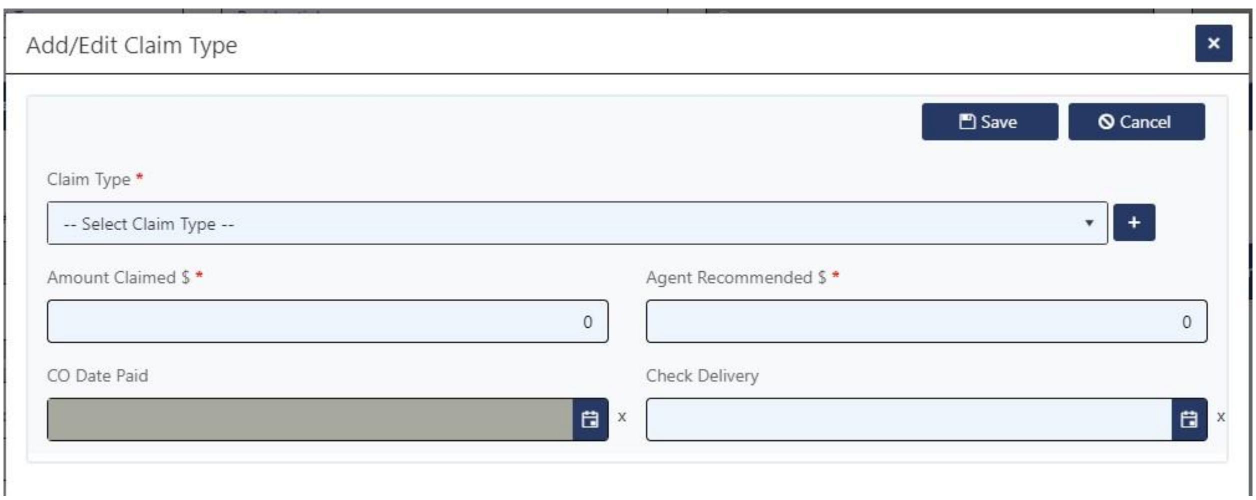
7.11.6 Claims Tab

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.

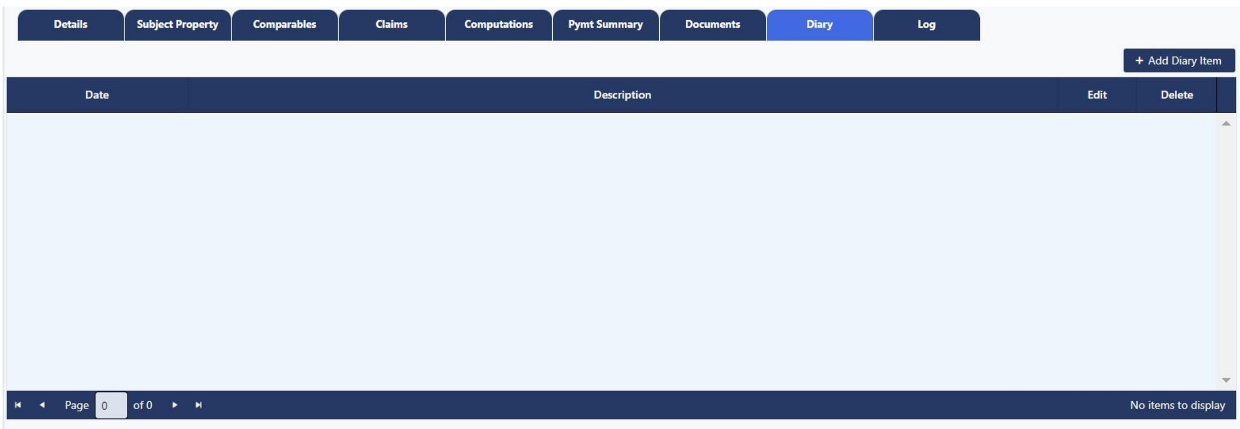
7.11.7 Documents Tab

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:

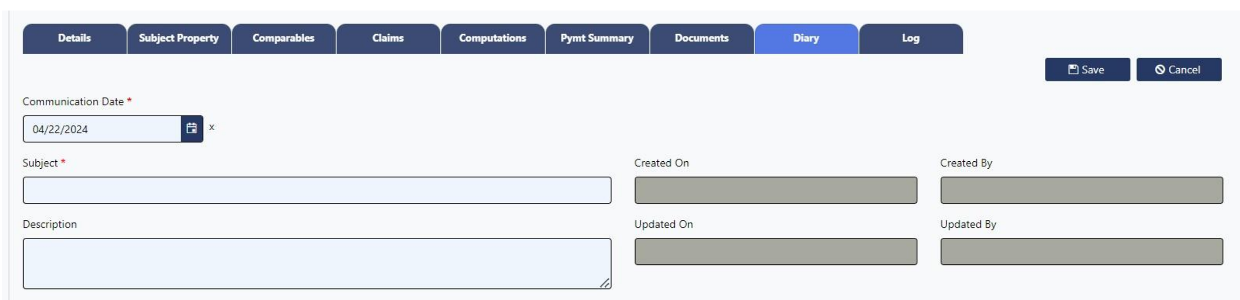
You have the ability to generate a new document by clicking on the generate button in the row of the document you wish to generate. This document will open in Text Control and will be saved in the overall Log (Section 5.0) and the Relocation Log (Section 7.11.9). The next time you open the Documents 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:



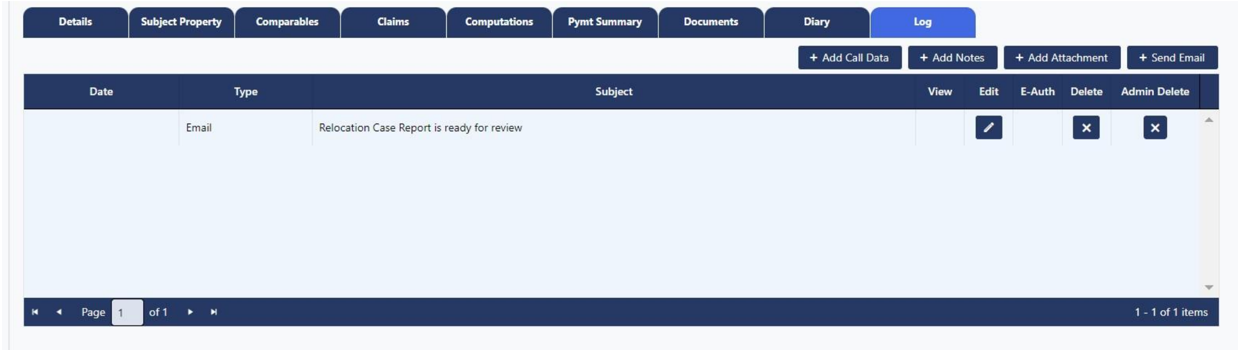
To add a Diary item, click the Add Diary Item button and the following screen will open:



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

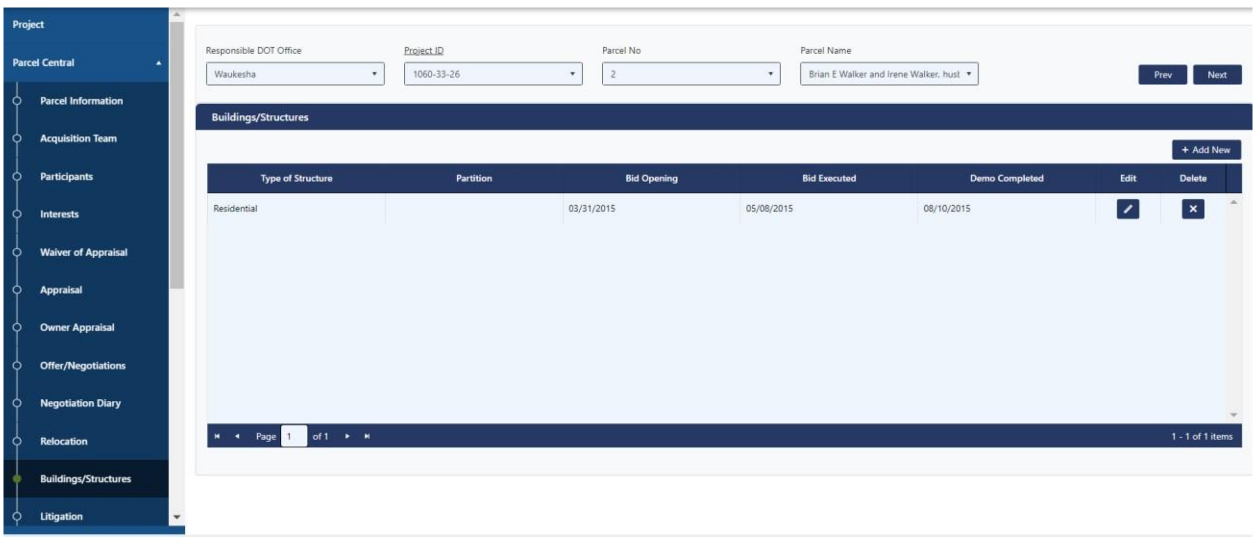
When you click on the Log tab, the following screen will open:



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

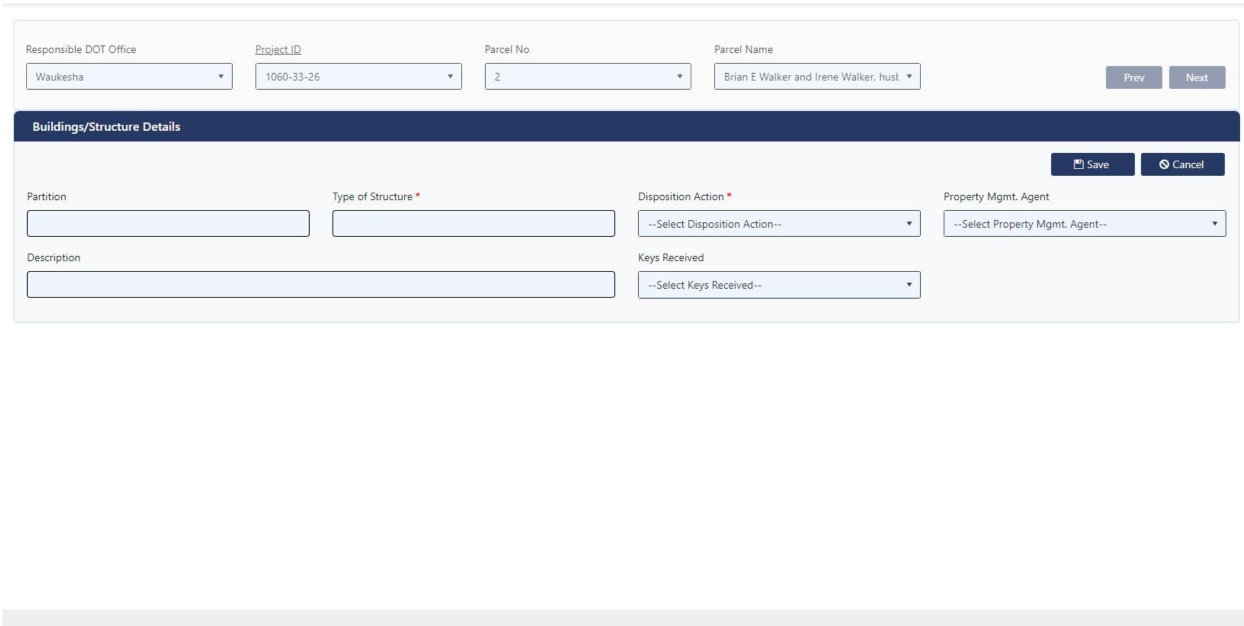
7.12 Buildings/Structures

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:



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

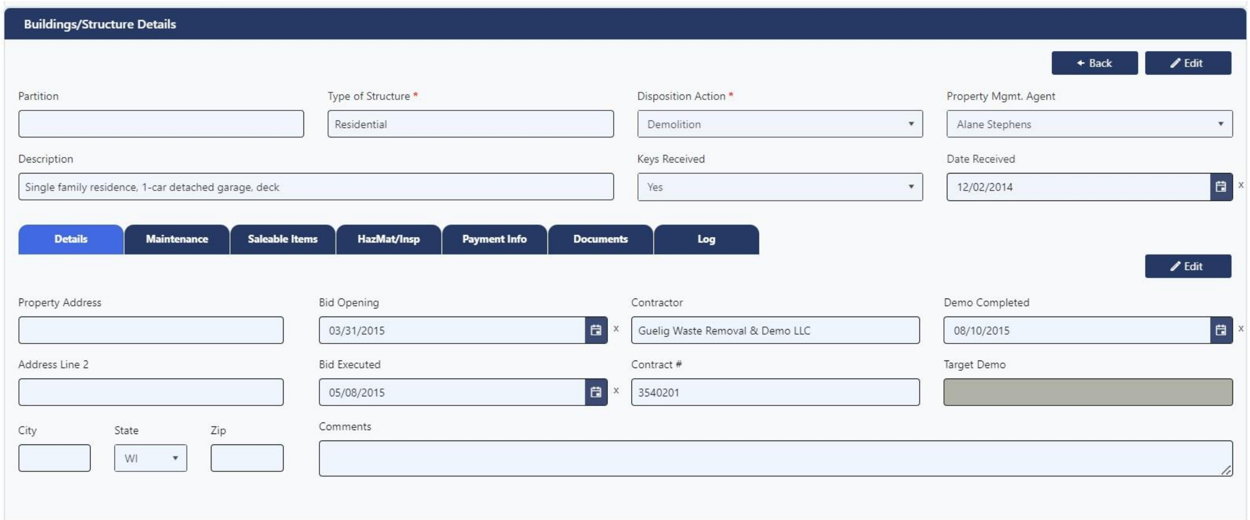
To add a new structure to the parcel for maintenance/demolition click on the Add New button and the following screen will open:



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

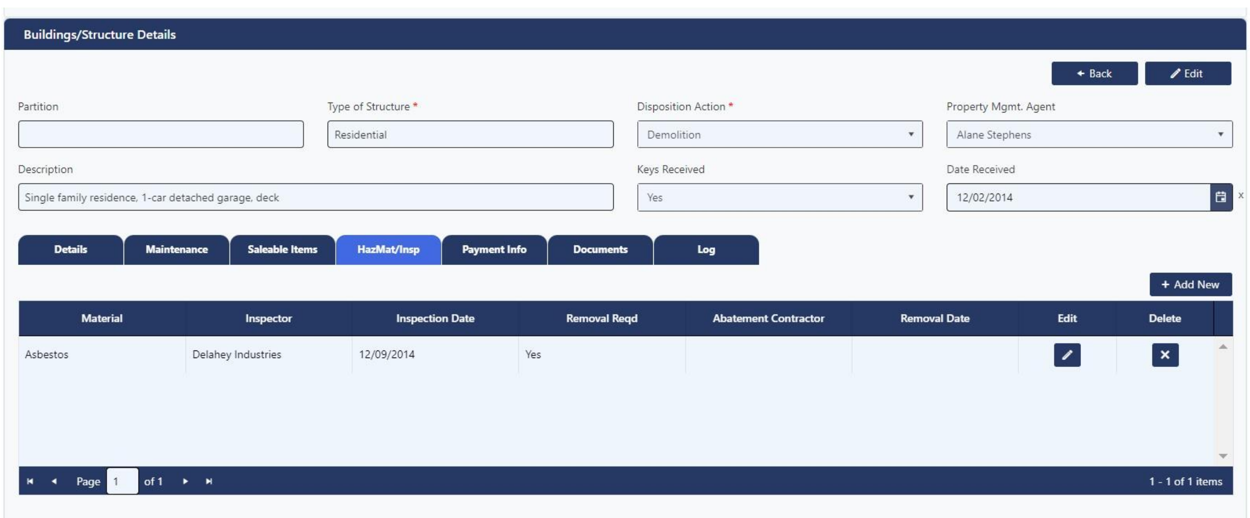
When you come to the Buildings/Structures screen, Details tab below will show up by default, the following will open:



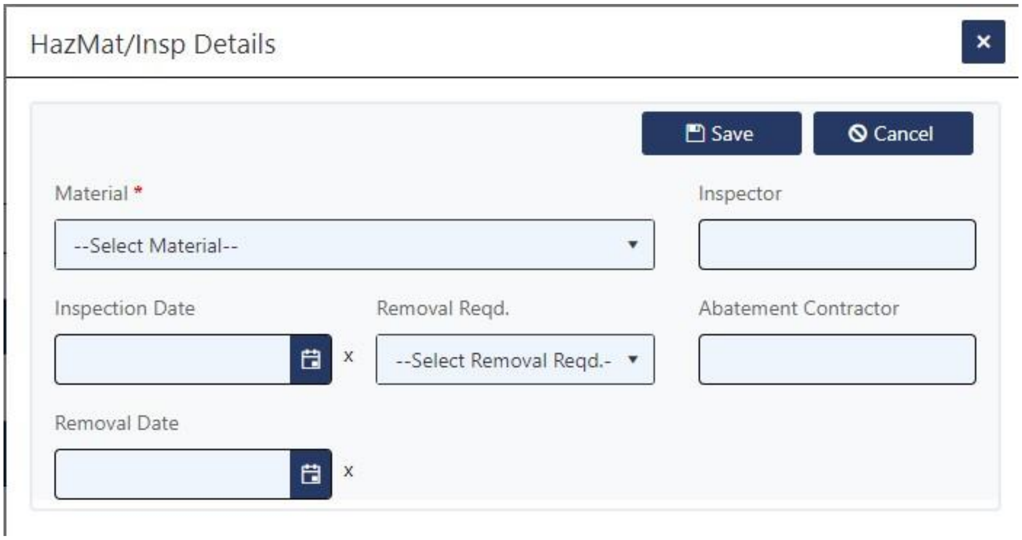
Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the screen.

7.12.2 HazMat/InspTab

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



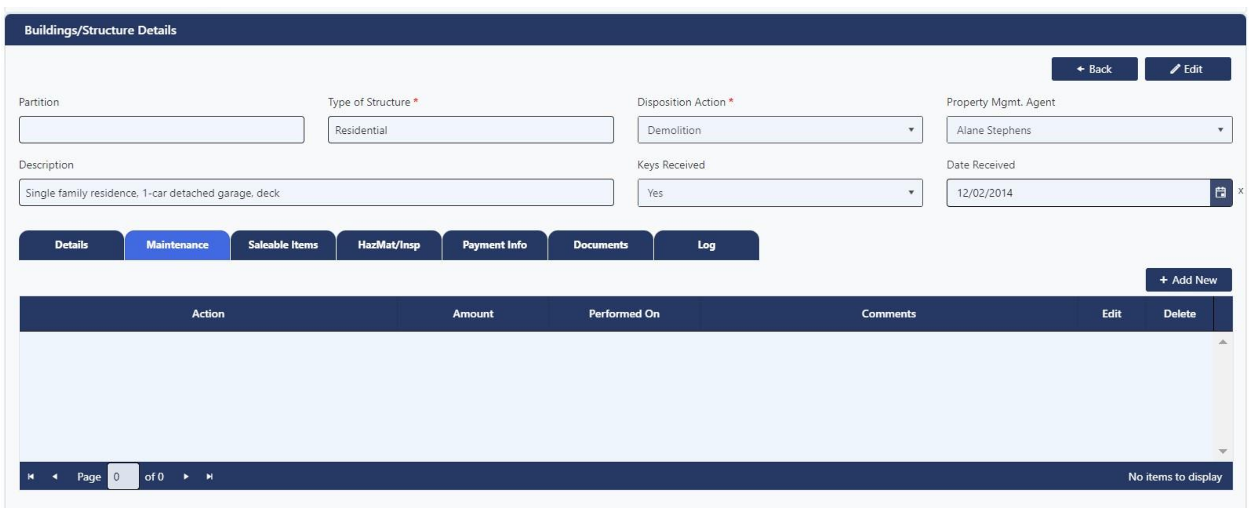
This list will keep track of hazardous materials and related information about asbestos inspection and asbestos removal for each structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the 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:



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:

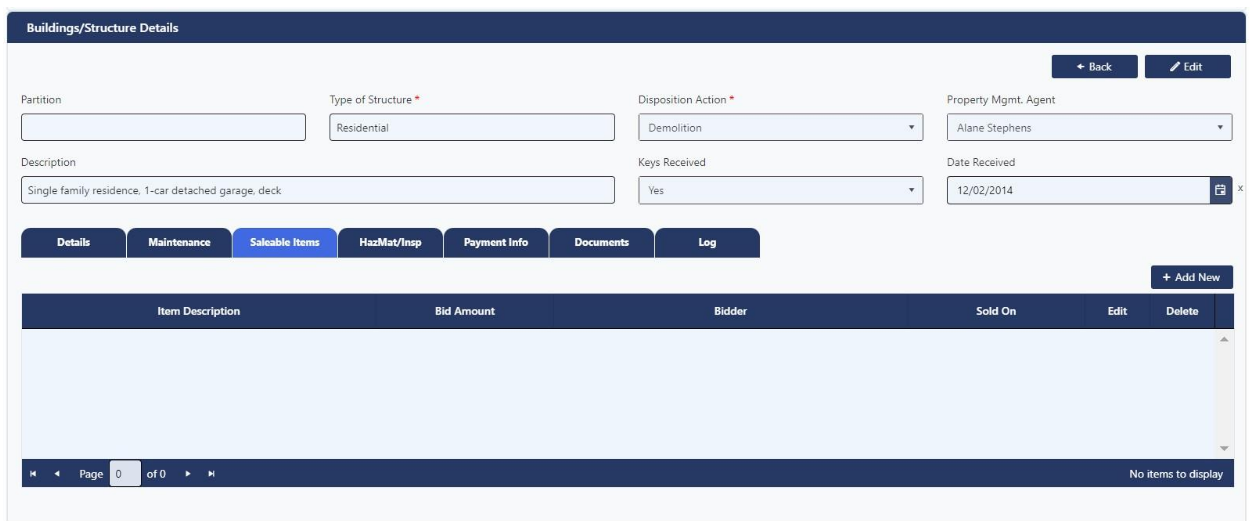


This list will keep track of list of maintenance type of actions performed on this structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the delete button for the desired row in the list. 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:

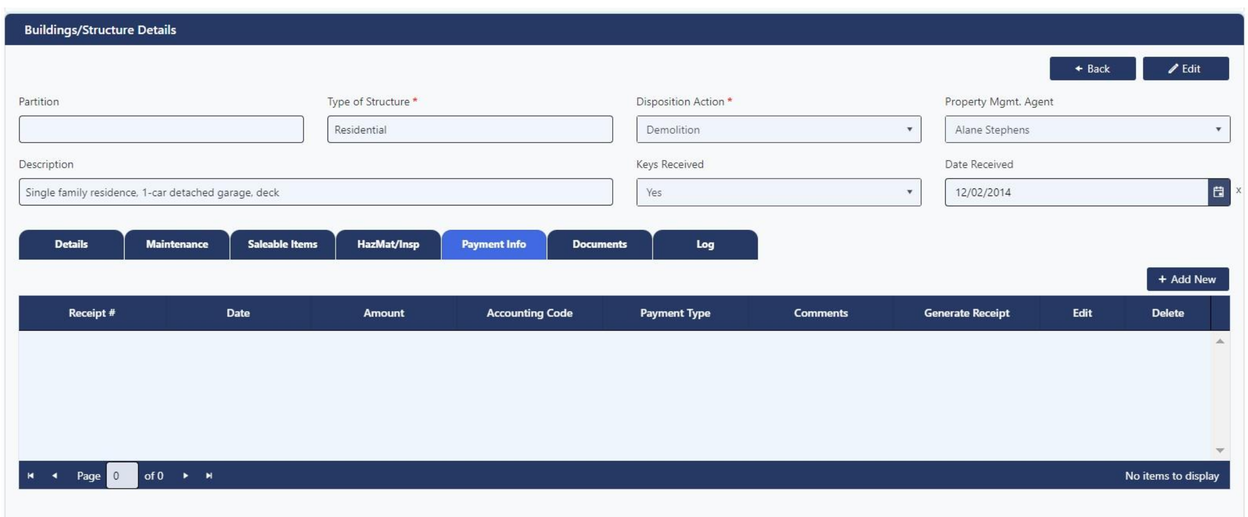


This list will keep track of list of saleable items on this structure entered for a parcel. To view/edit an existing record in the list you can click on the edit button. If you want to delete an existing record you can click on the delete button for the desired row in the list. To add a new entry in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

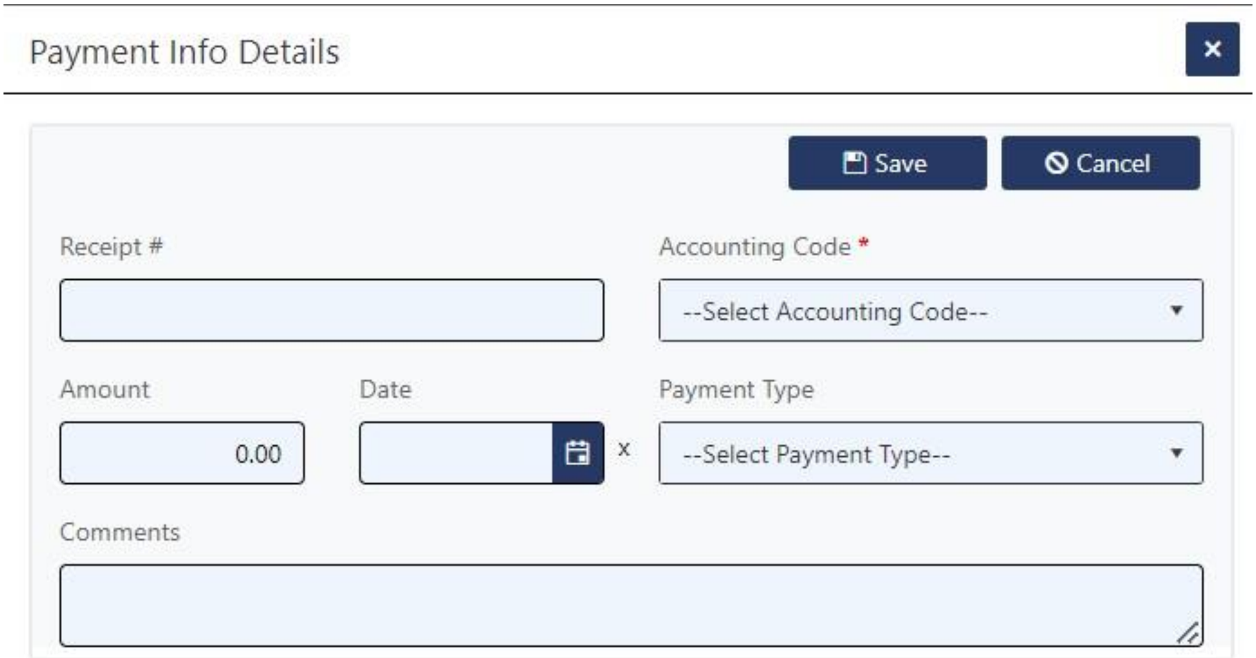
You must specify the description of the saleable item. Once you are done entering the entire information click on the Save button to save the changes, if you do not wish to save your changes then click the cancel button to return to the list.

7.12.5 Payment Info Tab

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

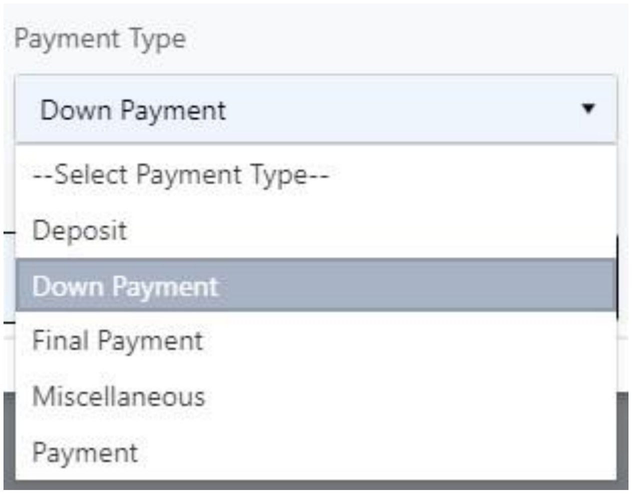


To add a payment, click the add new button and the following will open:



You must choose a Class Code from the list below

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

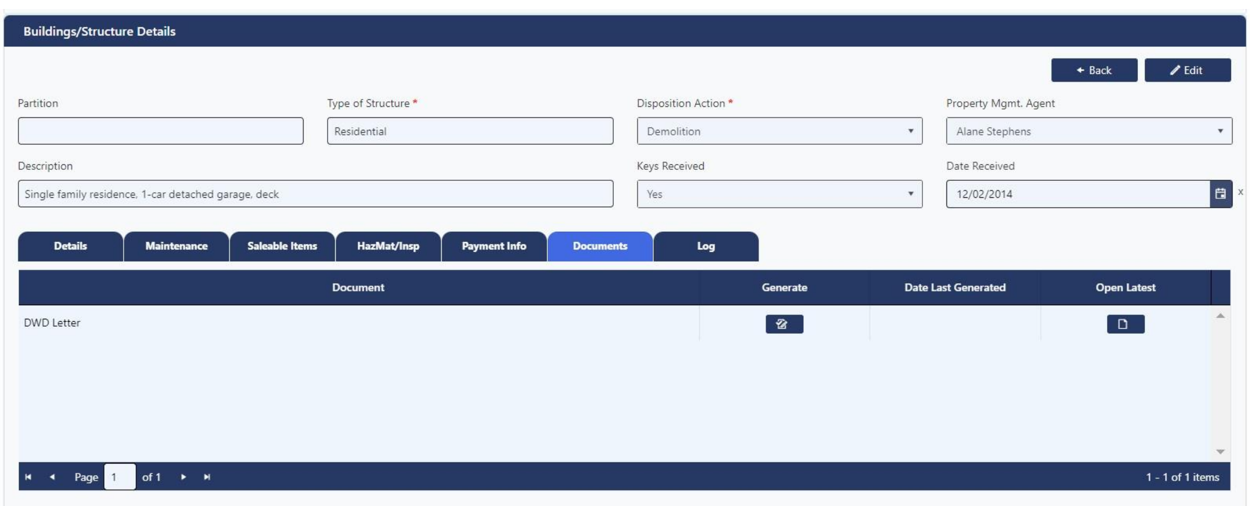


When you are done entering the data, click the save button. If you do not wish to enter a new Payment, click the cancel button.

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:

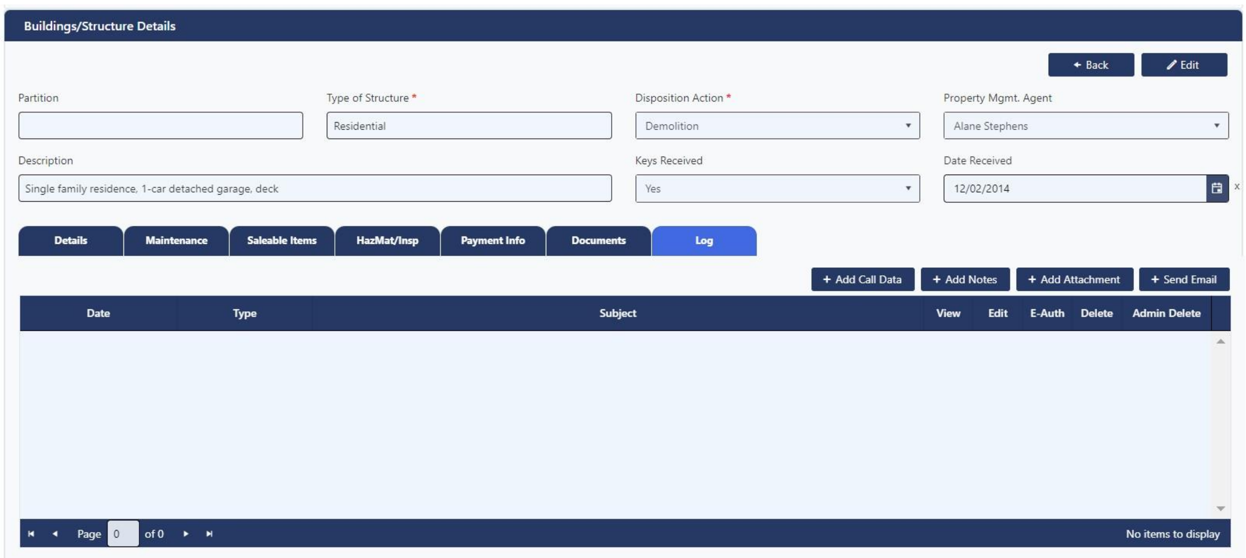


The name of the document/letter is listed in the left hand column. To generate the letter/document you will click the generate button in the Generate column.

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

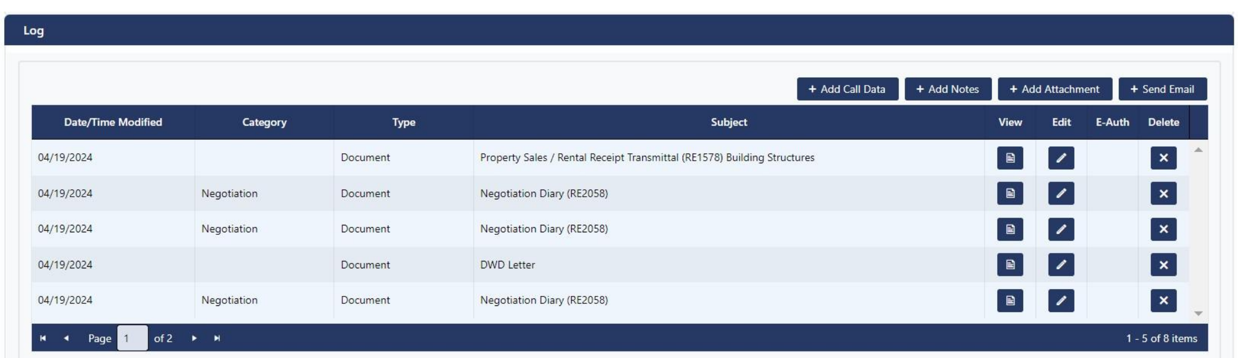
When you click on the Log tab, the following will open:



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

7.13 Parcel Log

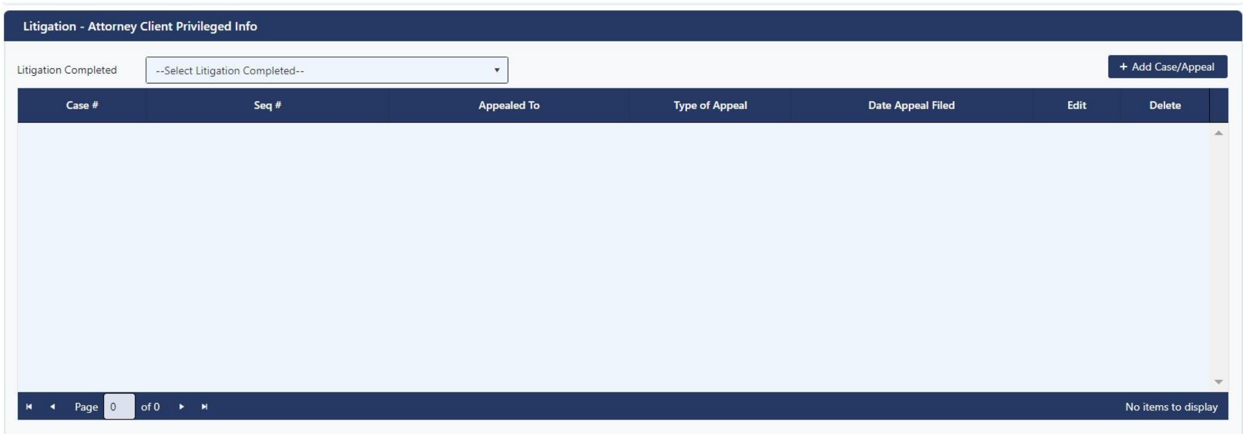
On the Parcel Menu, there is a Parcel Log. This log will include all of the entries from all Logs within each module of the Parcel Menu. When you click Parcel Log on the menu, the following will open:



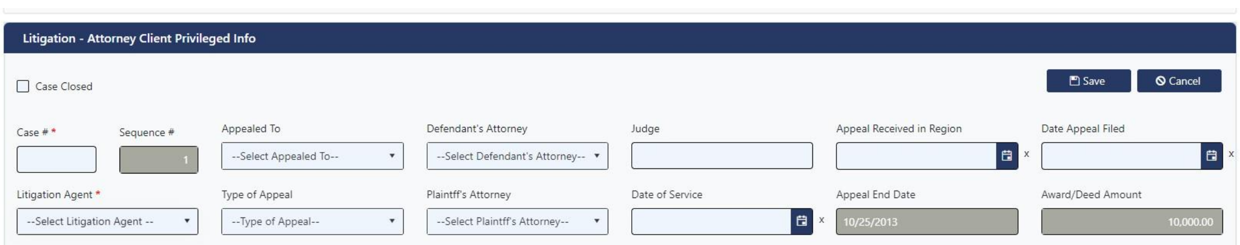
This log functions the same as all other logs throughout READS. For instructions on the log, refer to Section 5.0 of this User Manual.

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:



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:



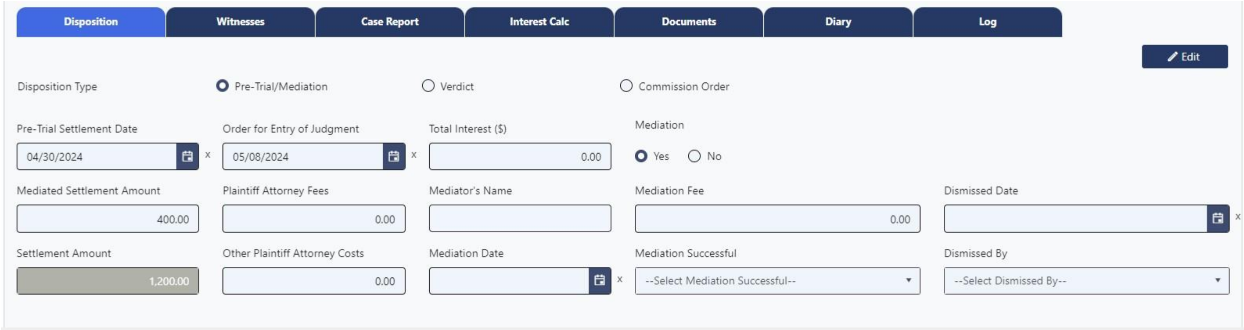
You will need to choose a Case # and Litigation Agent. The Litigation Agent dropdown list will populate from the Acquisition Team module located under the Parcel Central Menu.

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

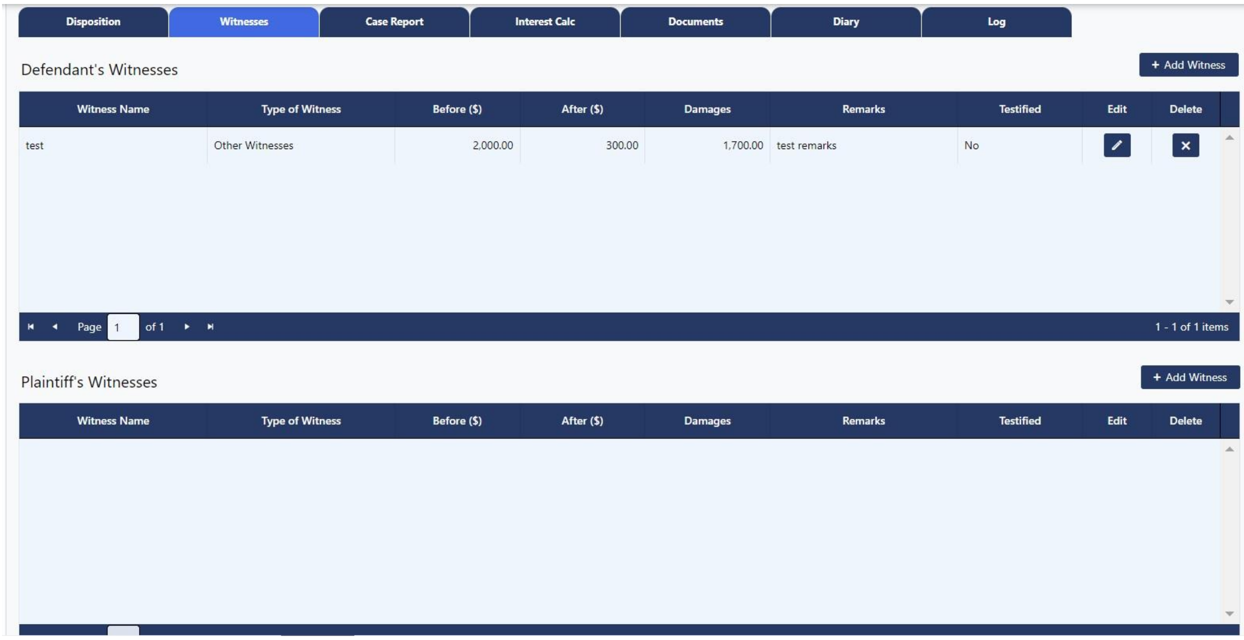
When you click on the Disposition tab, the following will open:



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:



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

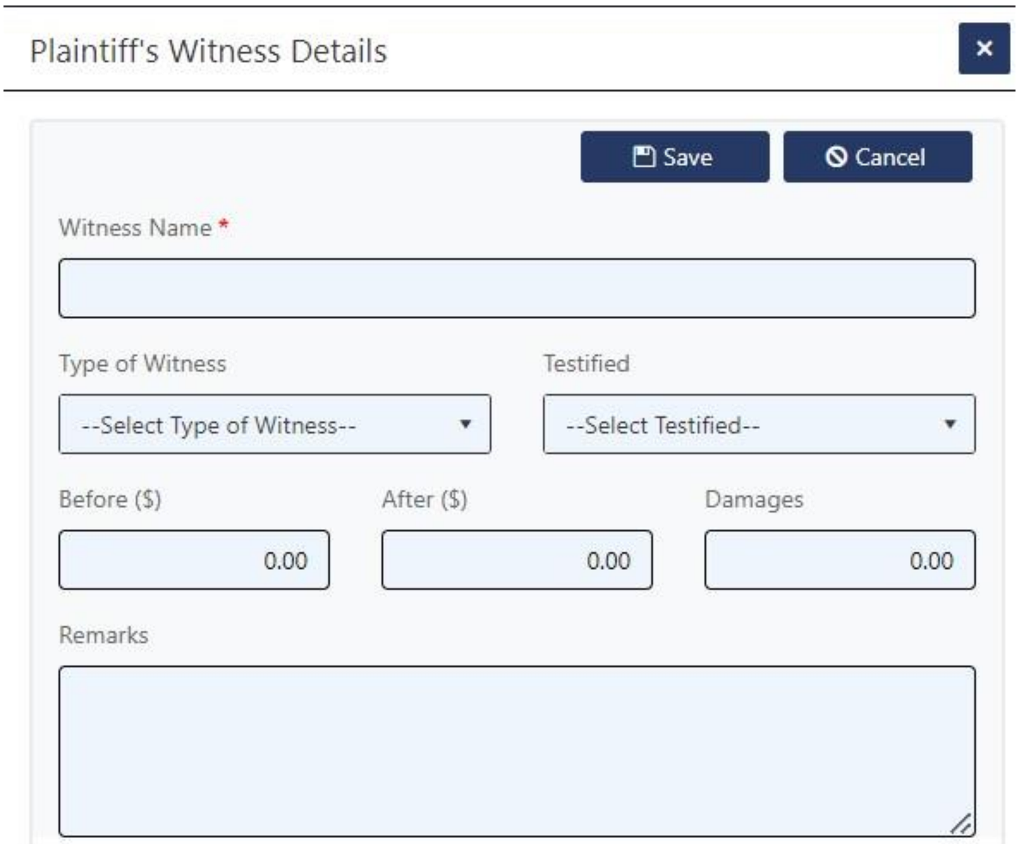
To add a new Defendant Witness, click the Add New button above the appropriate table and the following screen will open:

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:

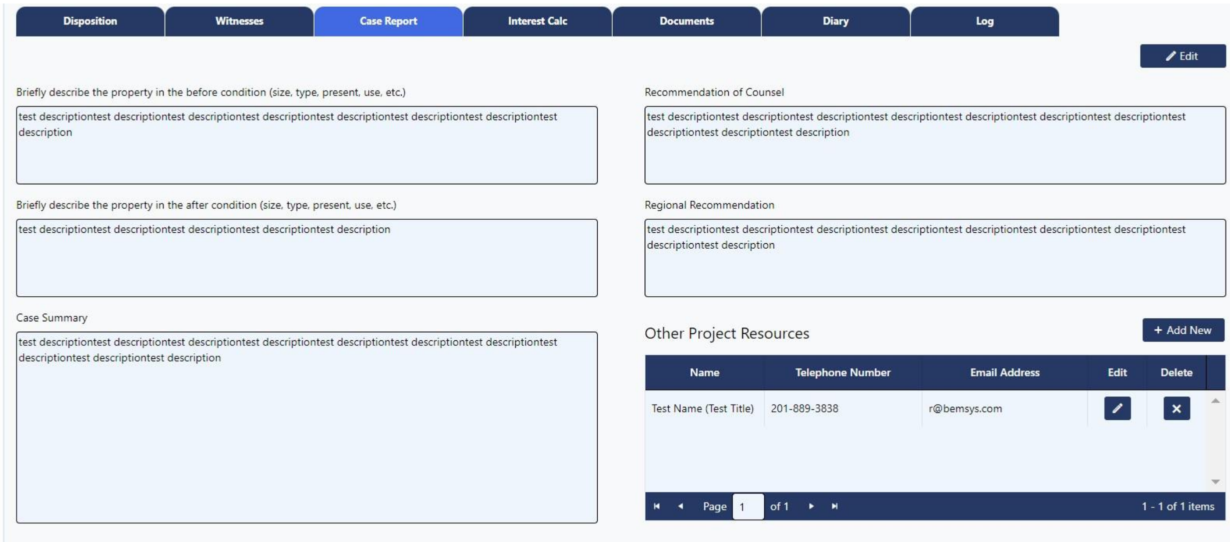


Once you have finished entering or editing the data, click the save button to save your changes, or if you do not wish to save the changes, click the cancel button.

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

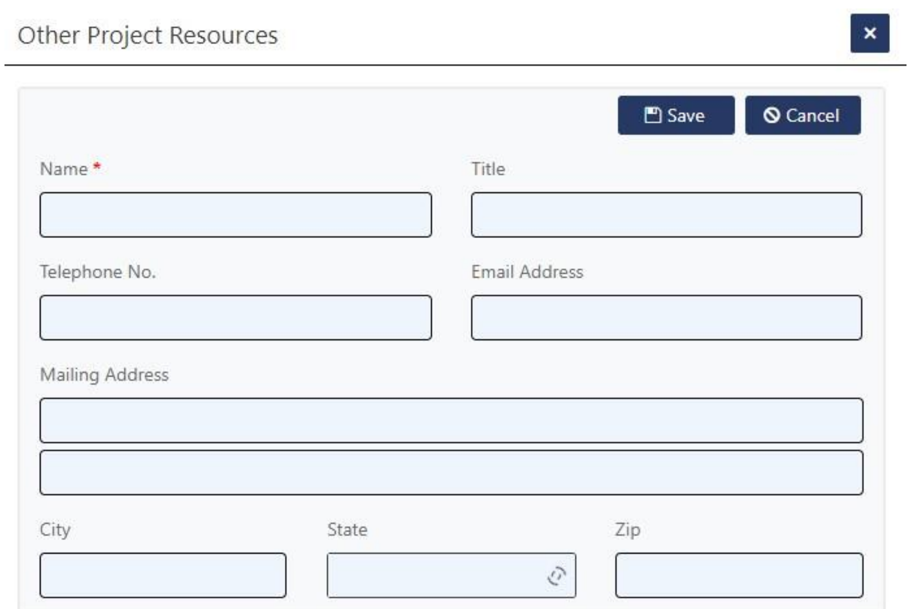
7.14.3 Case Report Tab

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



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.

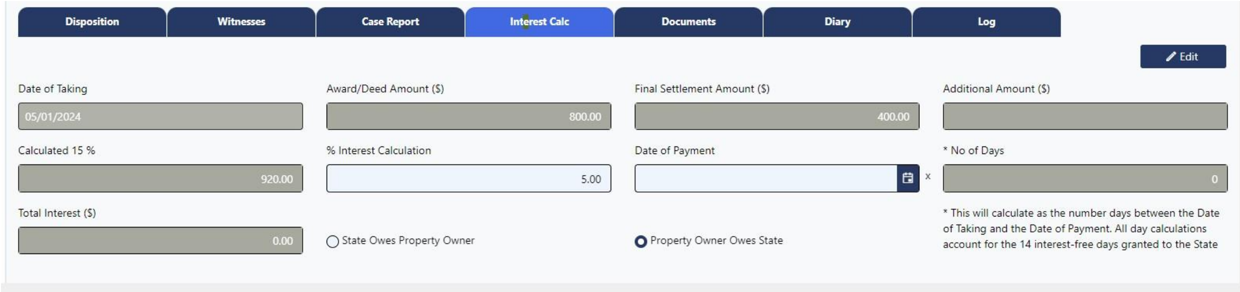
To add Other Project Resources, click the Add New button and the following screen will open:



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 you changes. If you do not wish to save the changes, click the cancel button.

7.14.5 Documents Tab

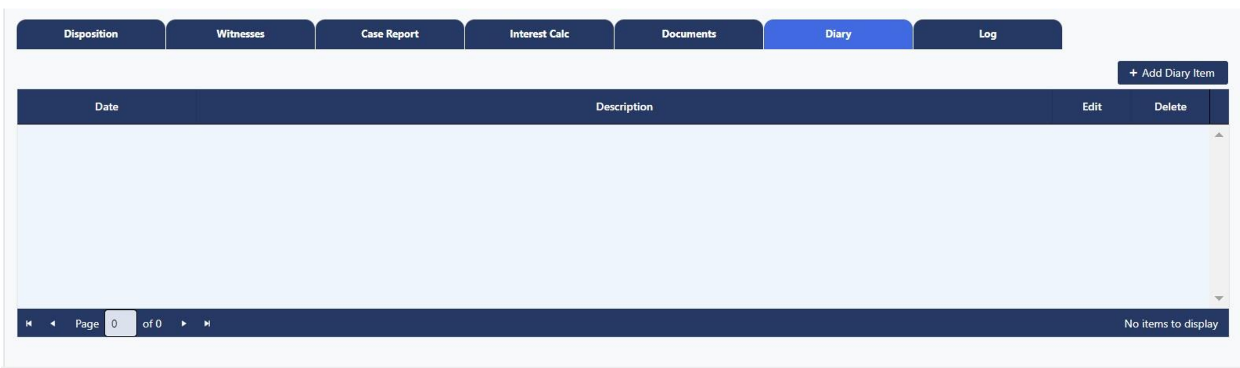
The documents screen allows you to open and generate documents associated with a property litigation. When you click on the Documents tab, the following screen will open:

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.

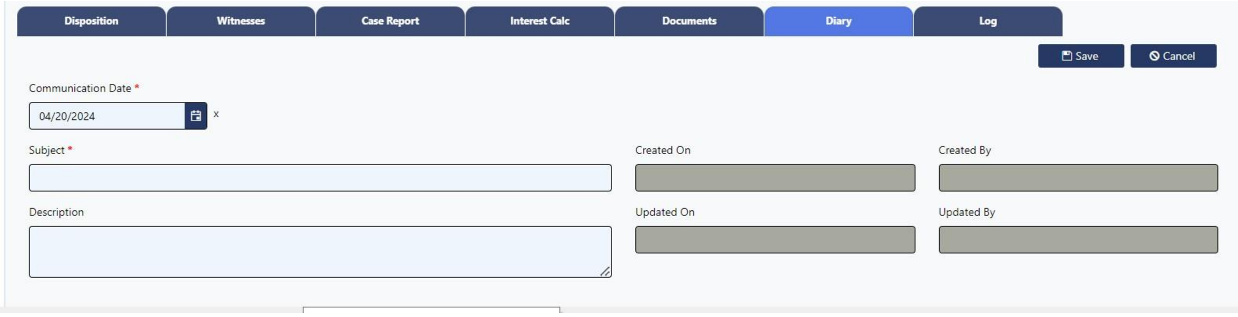
To open the latest document created, click on the open latest button in the row of the document you wish to open.

7.14.6 Diary Tab

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



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

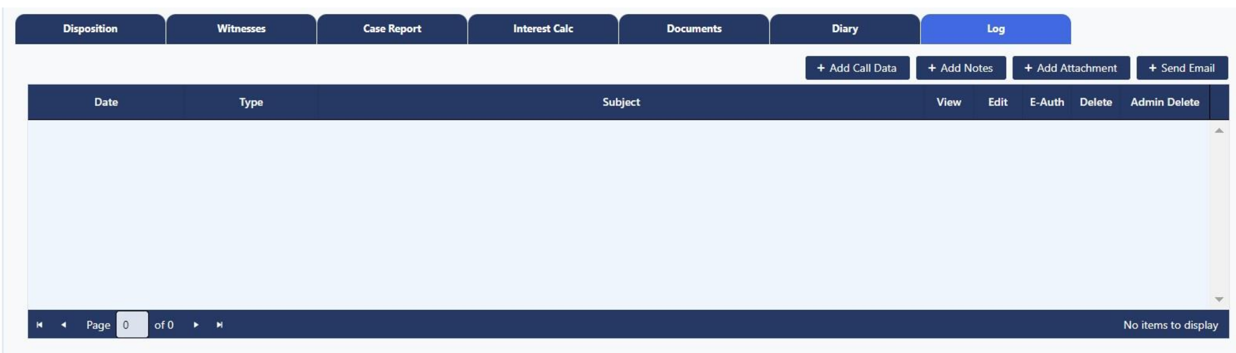


This form is the same as in the Log, as discussed in Section 5.0. The current date will be filled in by default but can be edited if necessary. The Subject is a required field and must be entered. The Description is not required but should be entered.

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

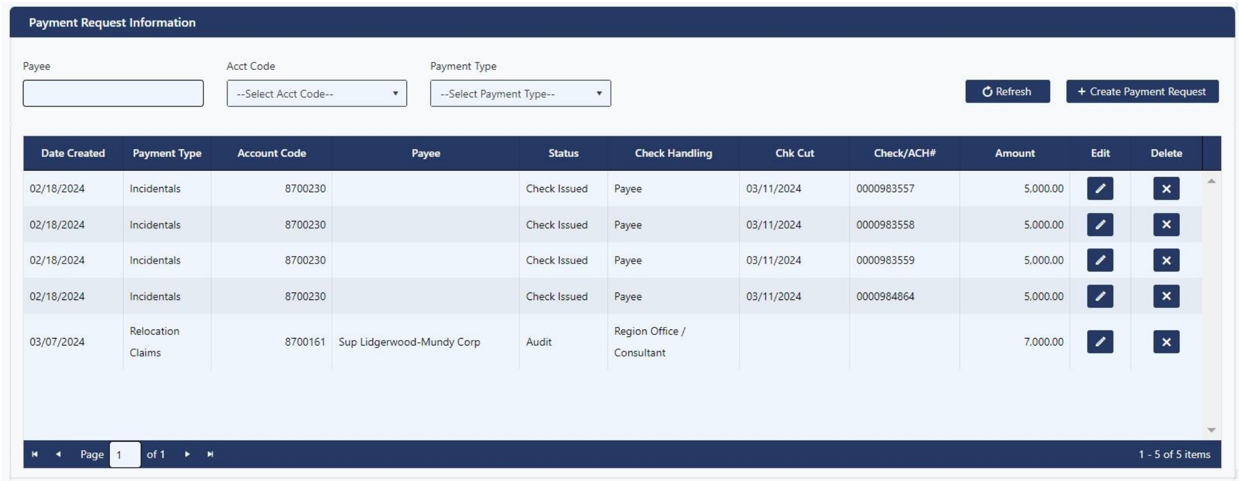
When you click on the Log tab, the following screen will open:



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:



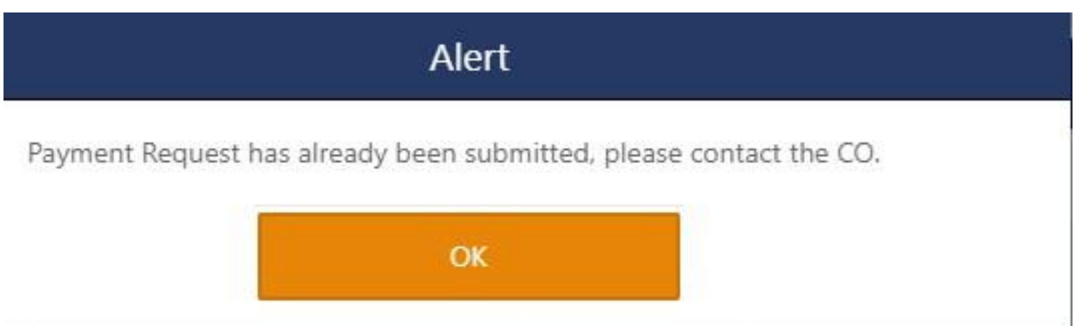
Payment Request Information

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

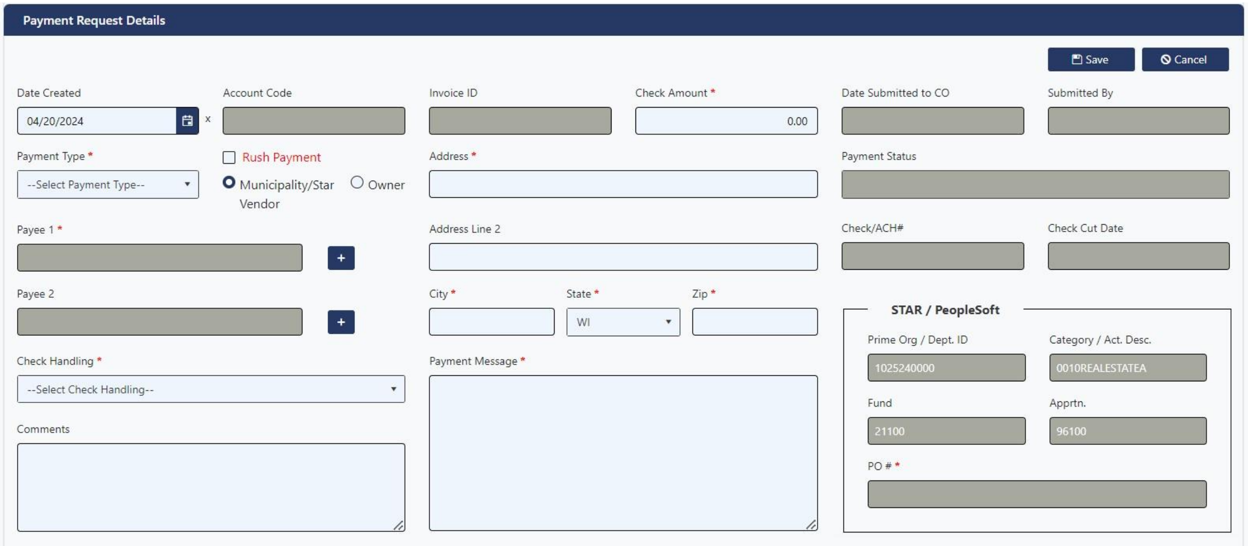
Date Created	Payment Type	Account Code	Payee	Status	Check Handling	Chk Cut	Check/ACH#	Amount	Edit	Delete
02/18/2024	Incidentals	8700230		Check Issued	Payee	03/11/2024	0000983557	5,000.00		
02/18/2024	Incidentals	8700230		Check Issued	Payee	03/11/2024	0000983558	5,000.00		
02/18/2024	Incidentals	8700230		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:



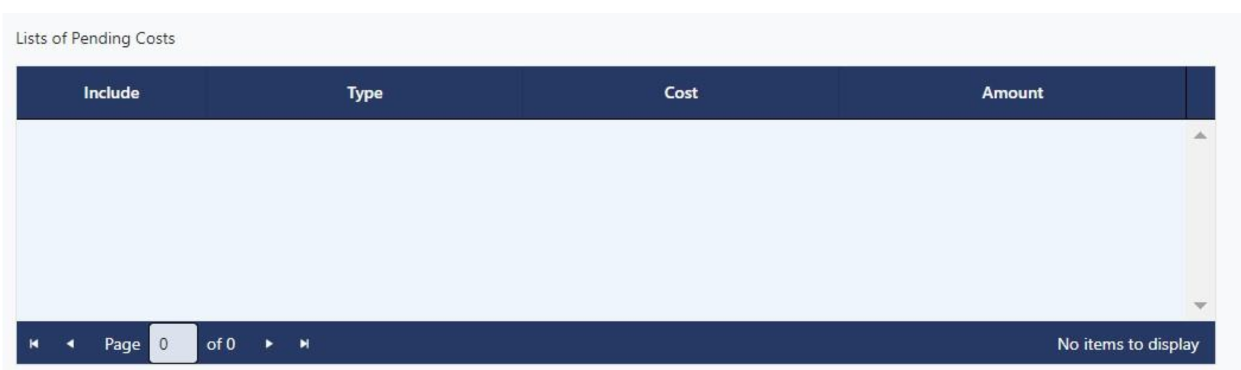
You can create a new payment request by clicking on the Create Payment Request button and the following screen will open:



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.

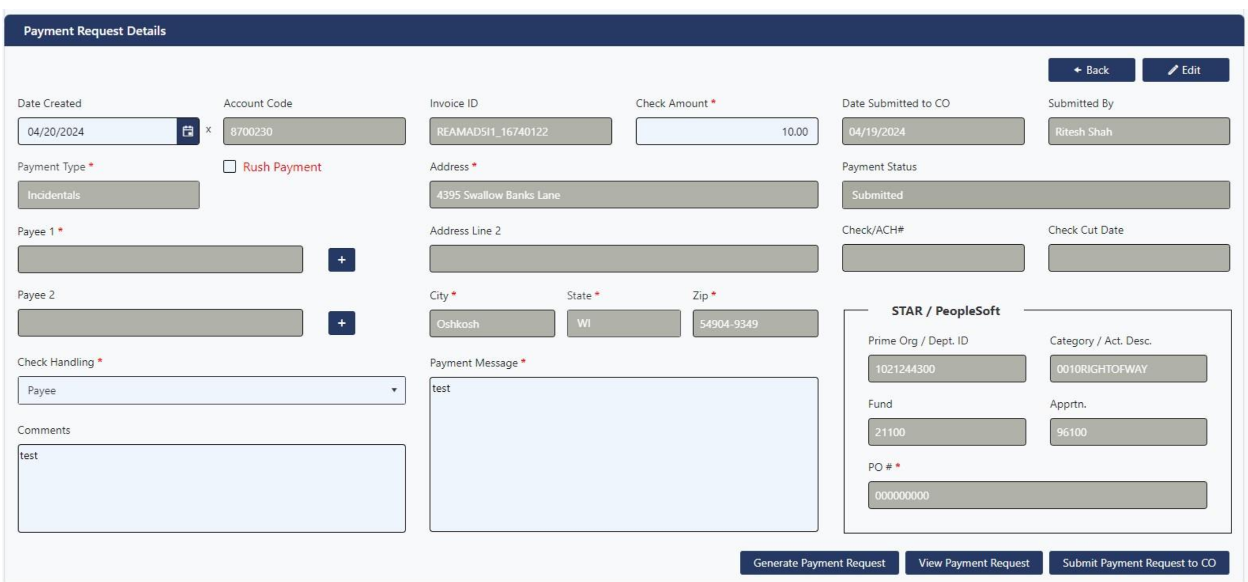
To convert it to the dropdown of participants you can click on the button next to the text field and will convert it to dropdown of list of participants for the parcel

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.

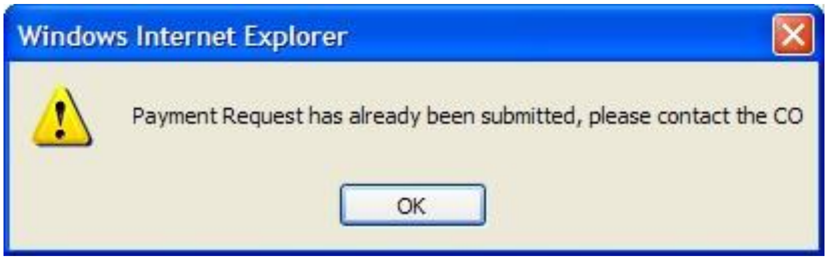


You can click on the Include checkbox in the desired row in order to include a cost in the payment request. As you check the cost items the total check amount will get calculated based on the amount entered in the Amount field in the table. Once you are done entering the information on the screen click 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:

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:



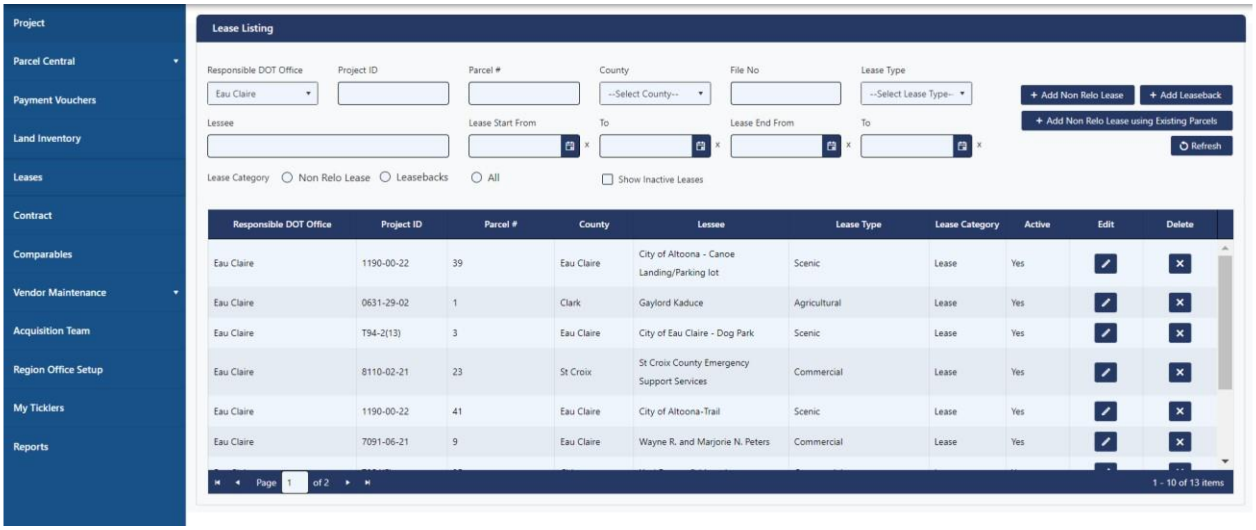
Once central office starts processing the payment request the status will automatically change to “Audit” status. Once the status is changed to “Audit” you will not be allowed to make any changes or delete the payment request. If for some reason the payment request needs to be modified central office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

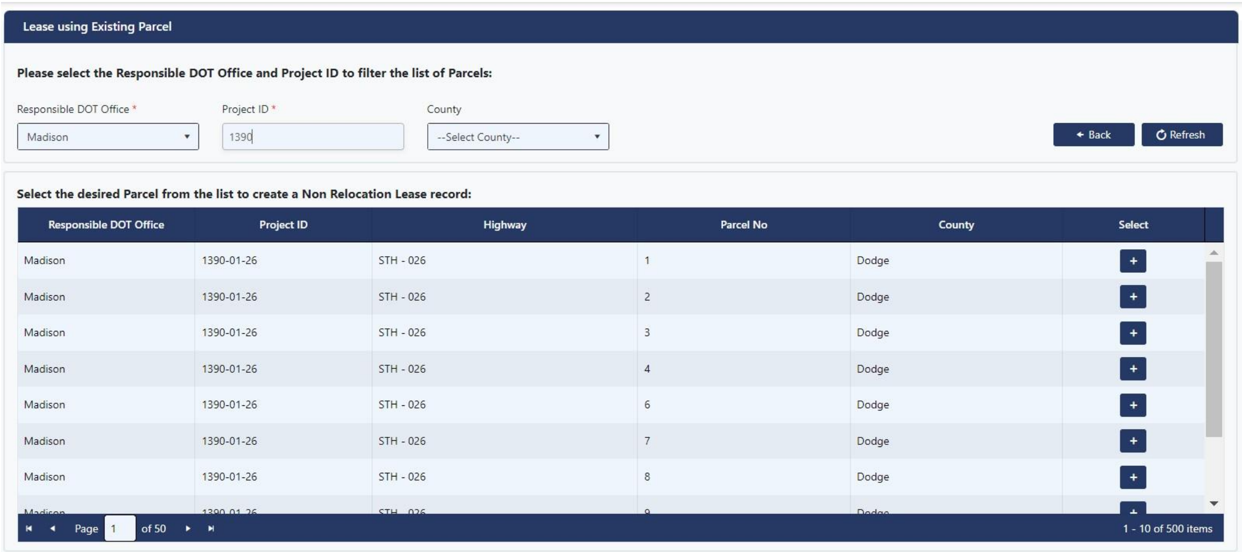


This list will show all Non Relocation Leases and Leasebacks. You can use the fields at the top of the list to filter the list. Once you have entered the data or chosen from the dropdowns to filter the list, you will have to click the refresh button. You can choose to show only Non Relocation Leases 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

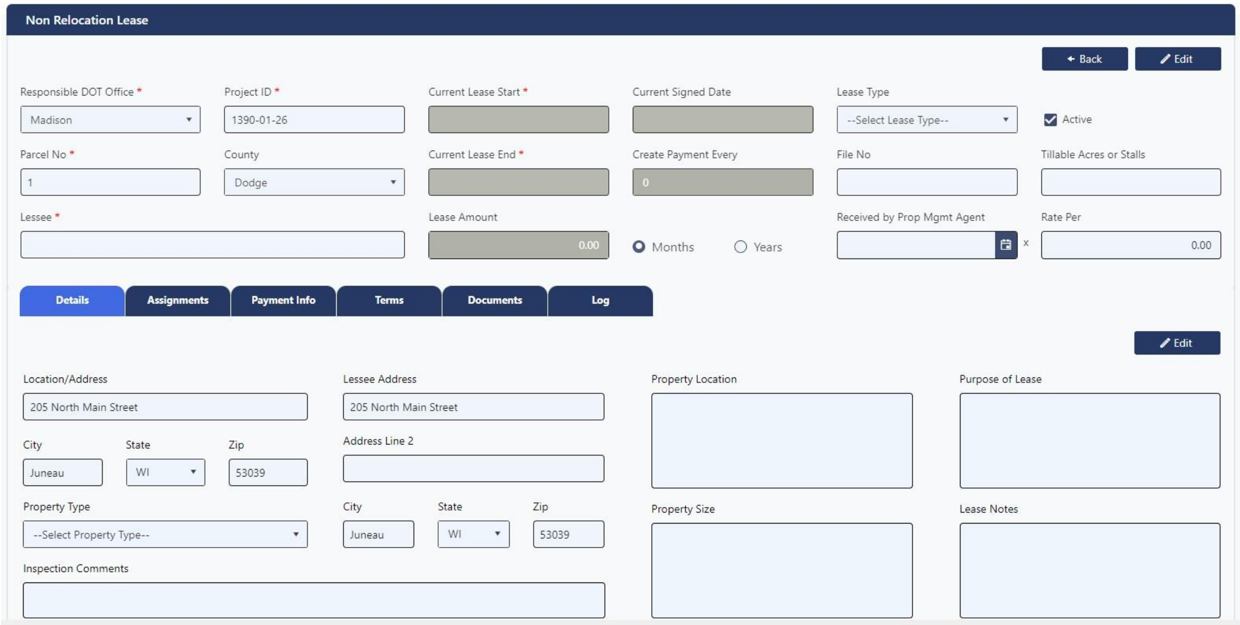
To add a new non relocation lease record, click add non relo lease button at the top of the main Leases screen. This will allow you to add a new lease property that is not associated with an existing parcel in READS. To add a property to be leased that is associated with a parcel that was previously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



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:



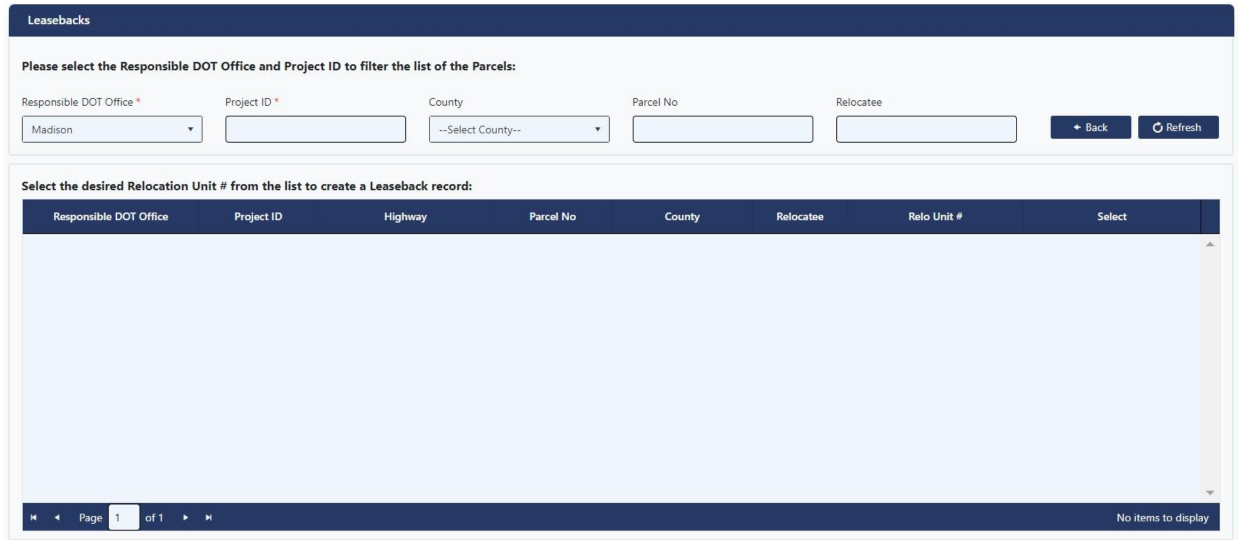
All the data fields are copied from the acquisition modules which includes the Region Office, Project Id, Parcel No, County and the Property Address.

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.

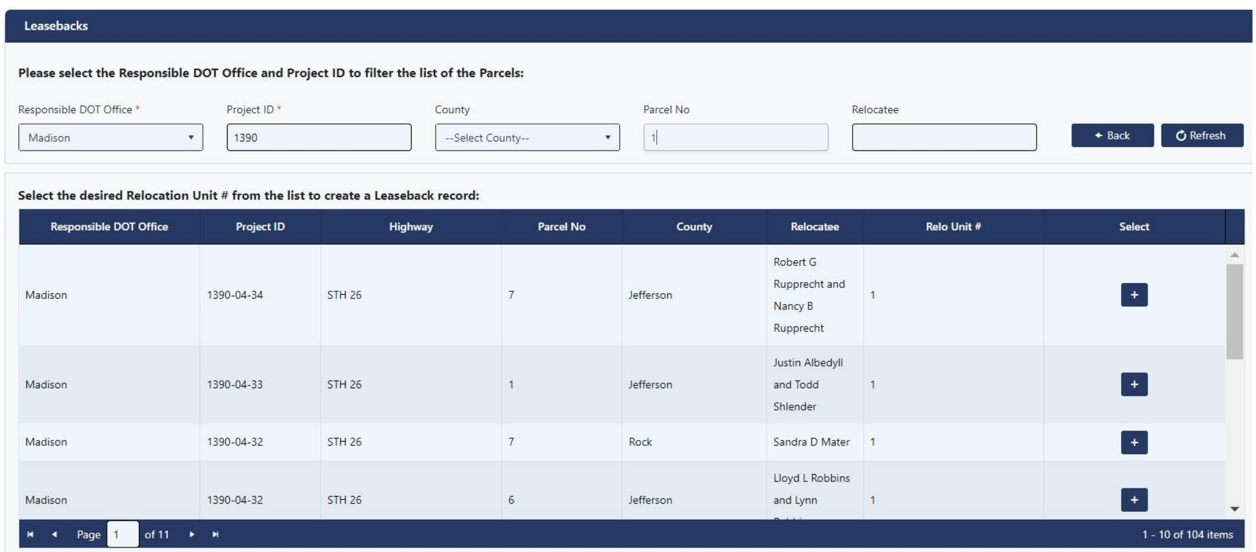
In addition to this you must enter the Lessee and the address of the lessee (for non relocation leases only), as well as the lease start and end dates. Also enter the rental amount and payment frequency. You can select the payment frequency for non relocation long term leases.

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:

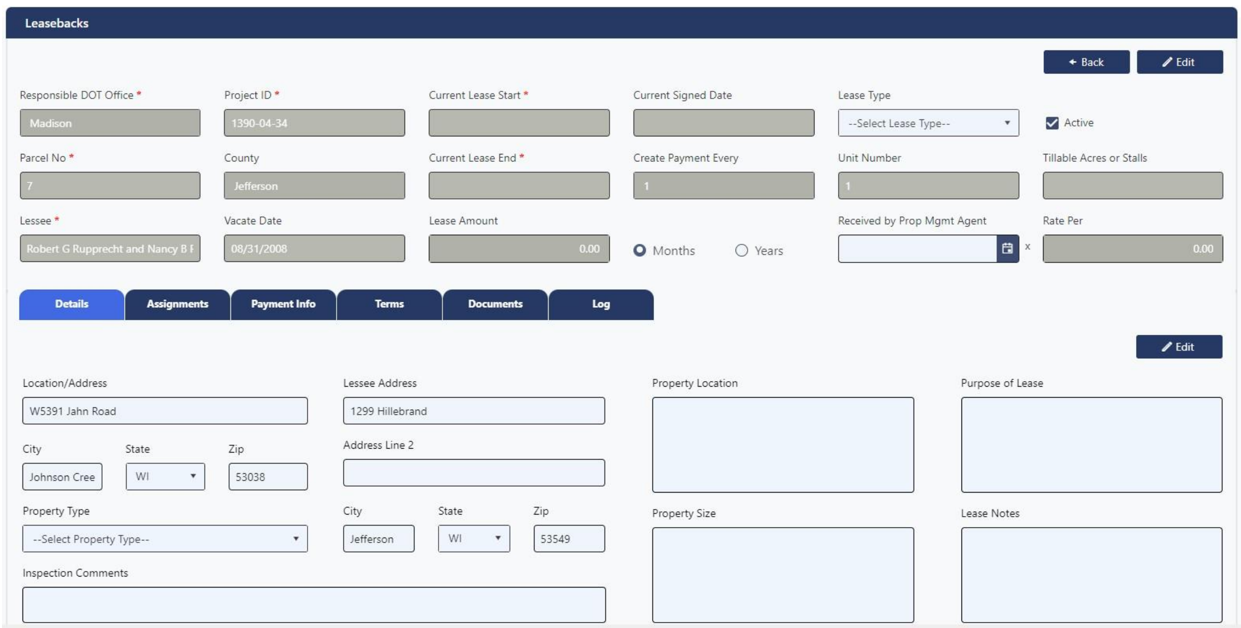


By default the region office will be selected, you must enter the Project ID. Also enter other fields as required which will filter the list of relocation records for a parcel you can copy the lessee information from. Once entered click the refresh button which will show you the list of relocation records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



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

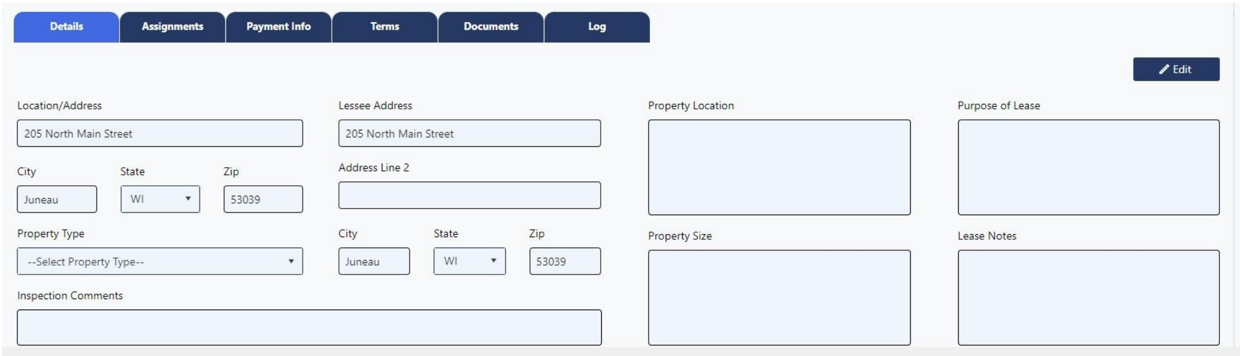
In addition to this you must enter lease start and end dates, as well as the rental amount and payment frequency. The Payment frequency should be set to monthly payments for leasebacks.

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

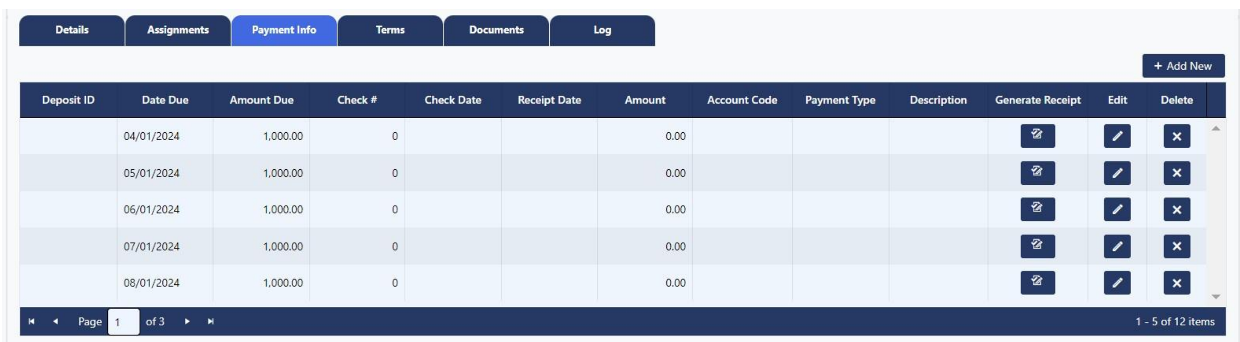
This tab will open by default when a user comes to the Lease details screen. Also clicking on the Details tab will show the following screen will open:



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

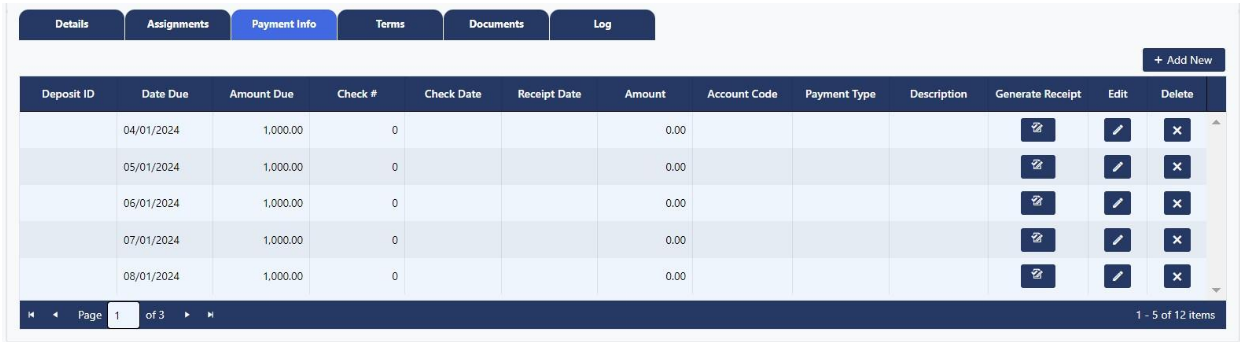
This tab will list a payment schedule automatically created for a lease or a leaseback record. When a user opens a lease record the Payment Info tab opens by default. The screen design remains the same for non relocation leases and leaseback. The following screen opens when the Payment Info tab is clicked:



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

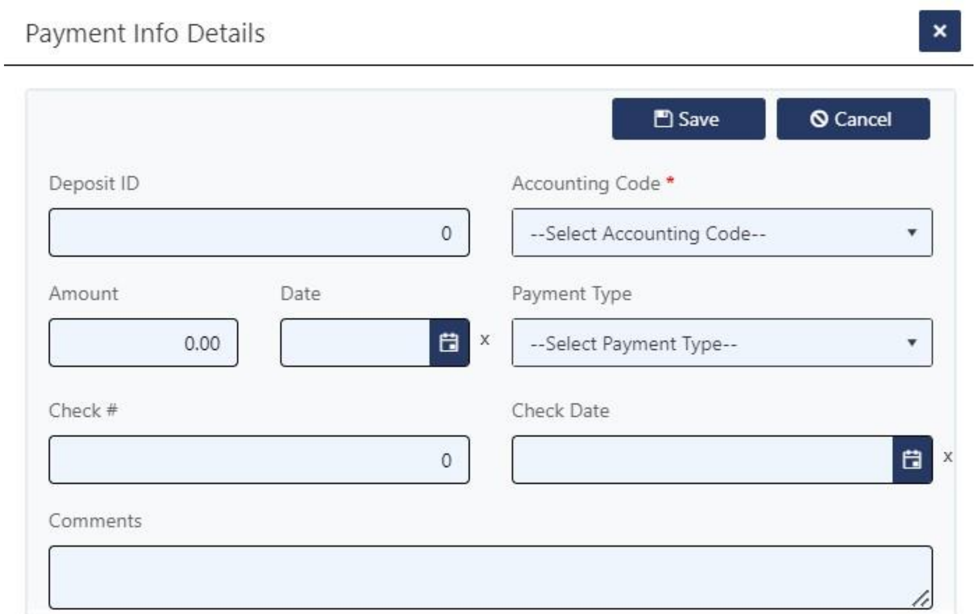
For leasebacks only monthly payments can be made so the payment frequency is always set to monthly payments:

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:



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:

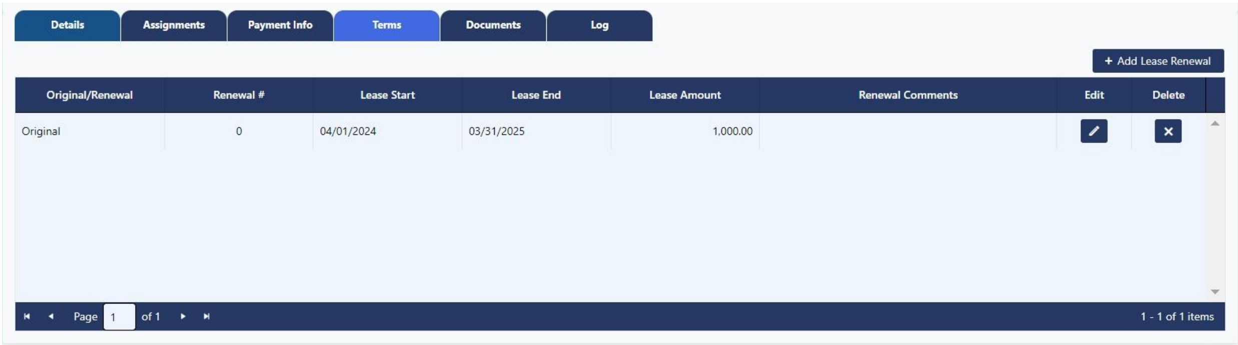


If you need to delete any of the existing payment records created for the lease period you can click on the delete button to delete a record from the table. The system will also calculate the payment schedule for lease or leaseback renewals.

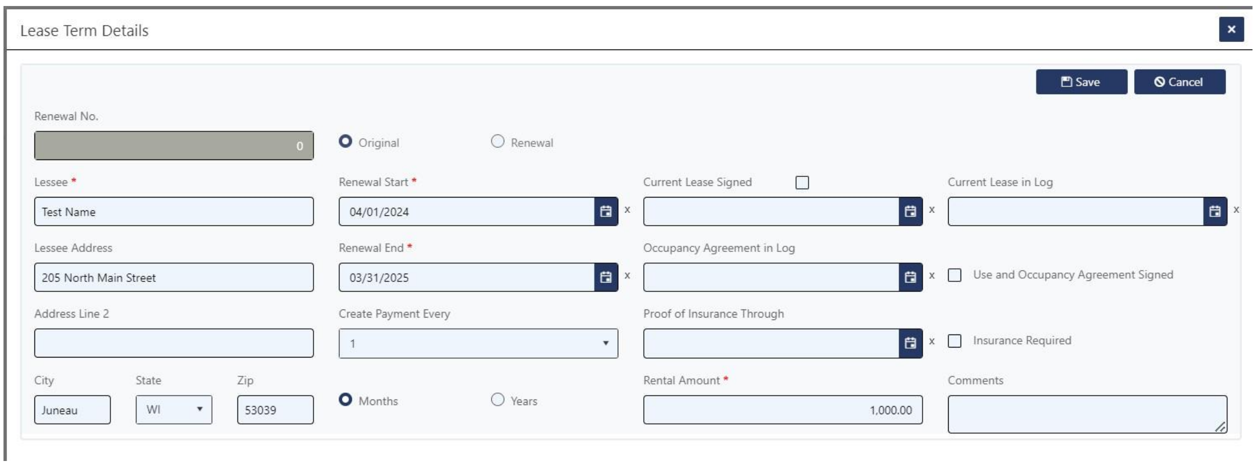
You can also generate the Rental Receipt for each payment received by clicking on the generate button for each row in the table

8.4 Terms Tab

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



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



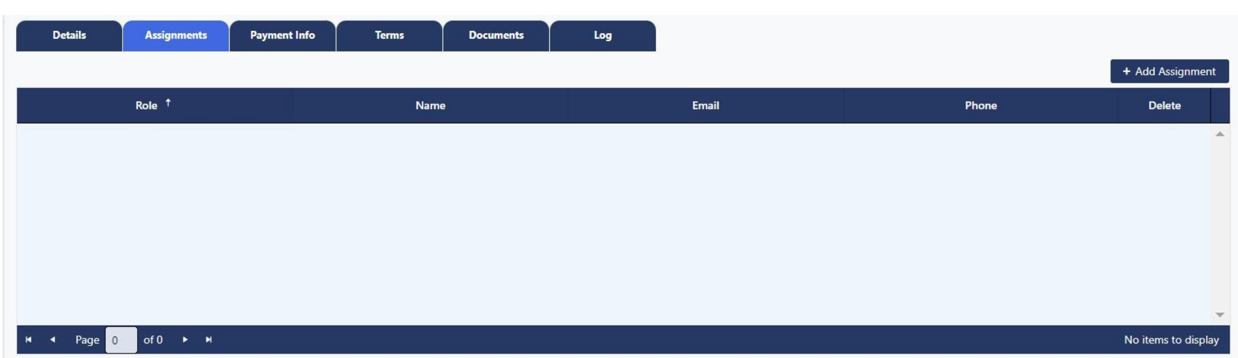
Enter the necessary fields and click the save button. This will add a row to the table on the screen. If you do not wish to save the renewal, click the cancel button.

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

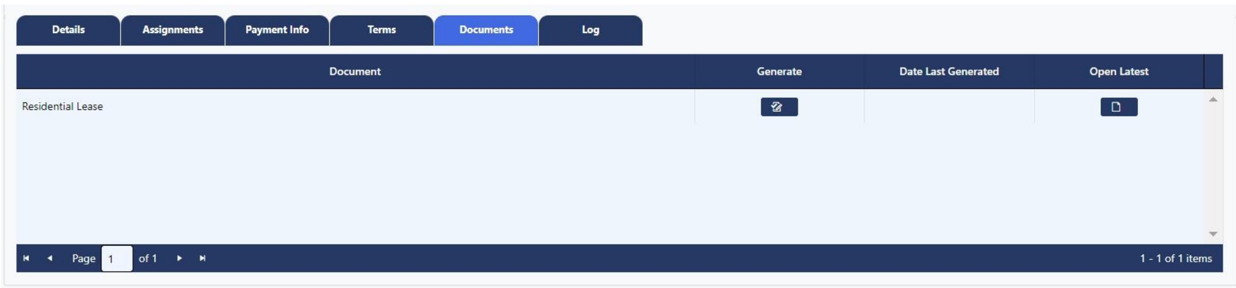
When you click on the assignment tab, the following screen will open:



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

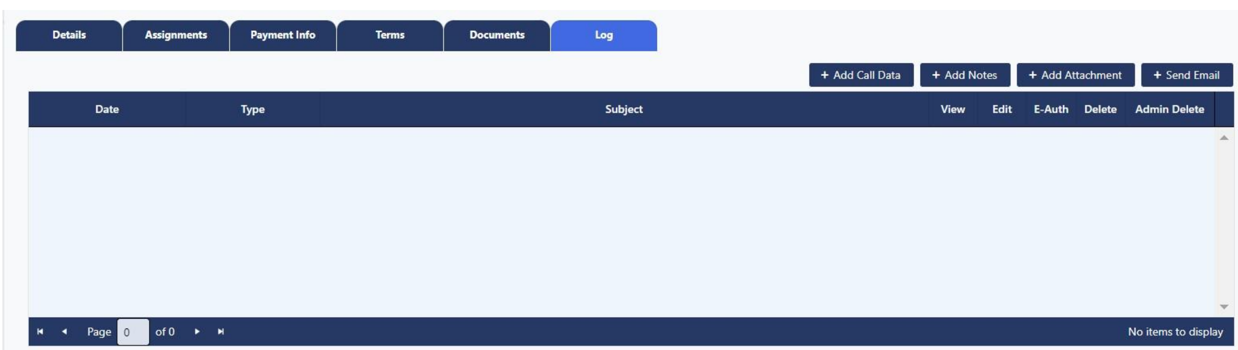
The documents screen allows you to open and generate documents associated with a lease/leaseback. When you click on the documents tab, the following screen will open:



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

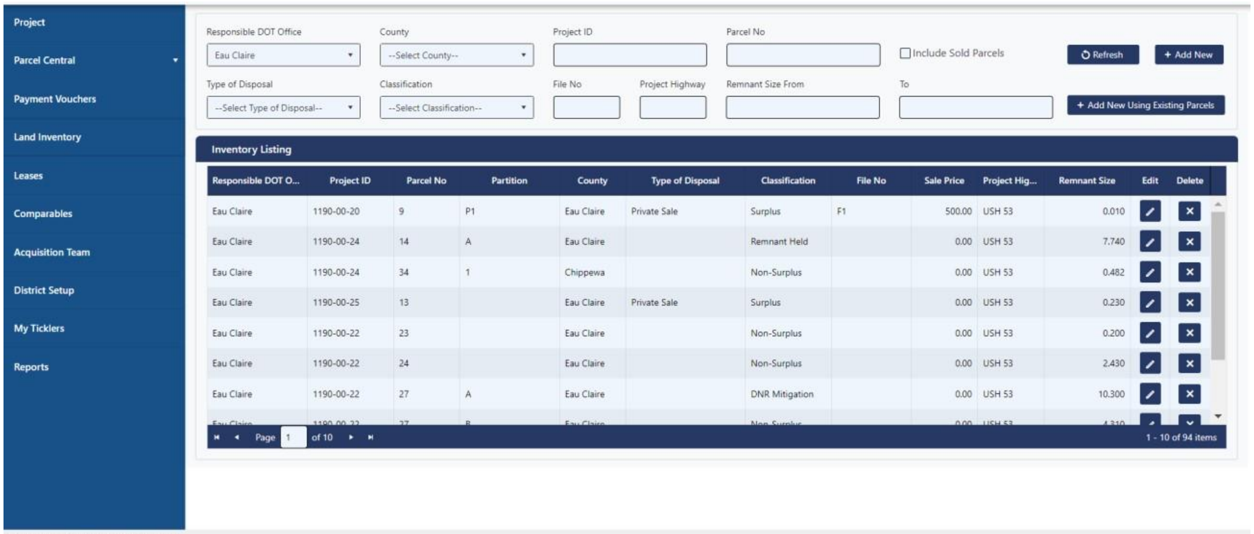
When you click on the Log tab. The following screen will open:



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

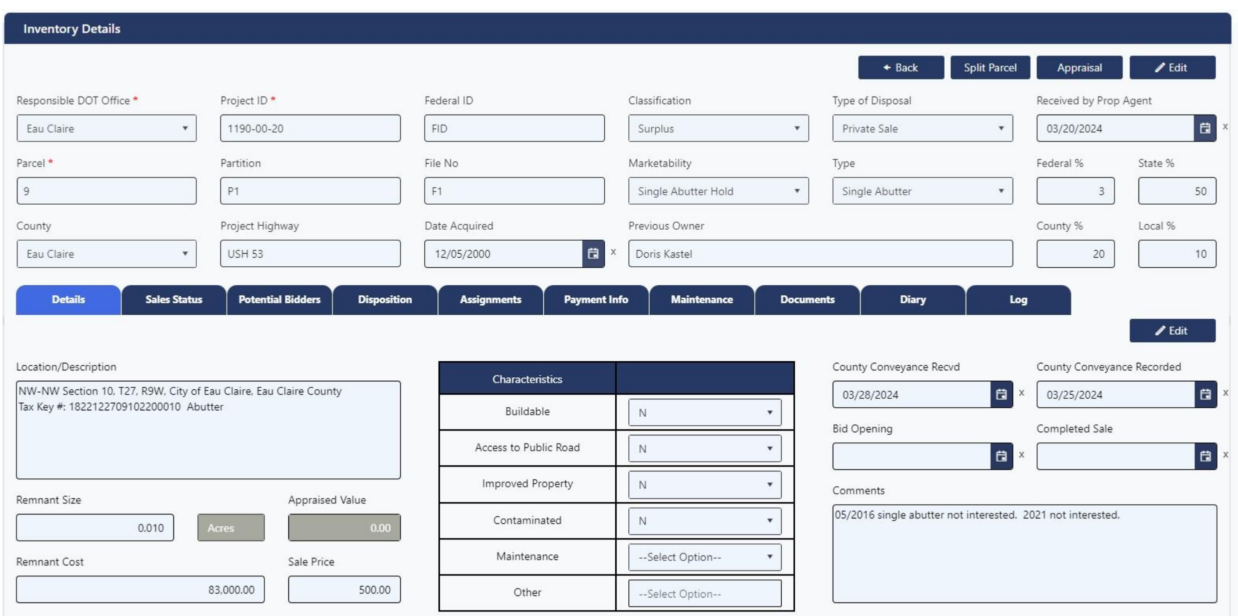
9.0 LAND INVENTORY

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:



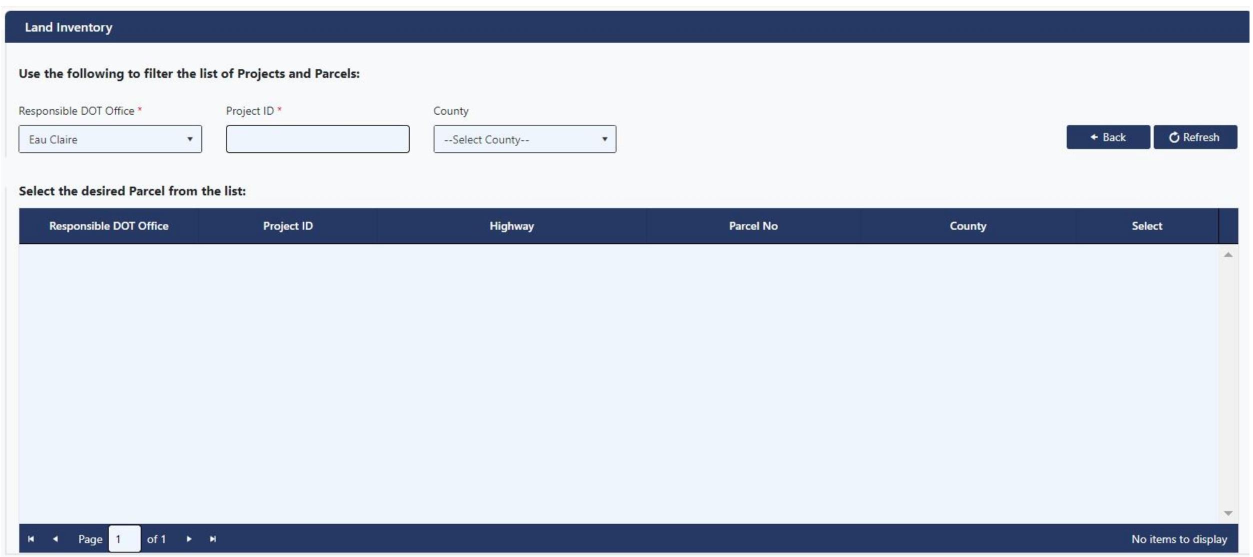
You will then need to click the edit button at the top of the screen to make changes. Complete the requested fields as needed. The details on this screen are described in Section 13.1 When you have finished making changes, click the save button. If you do not wish to save the changes, click the cancel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

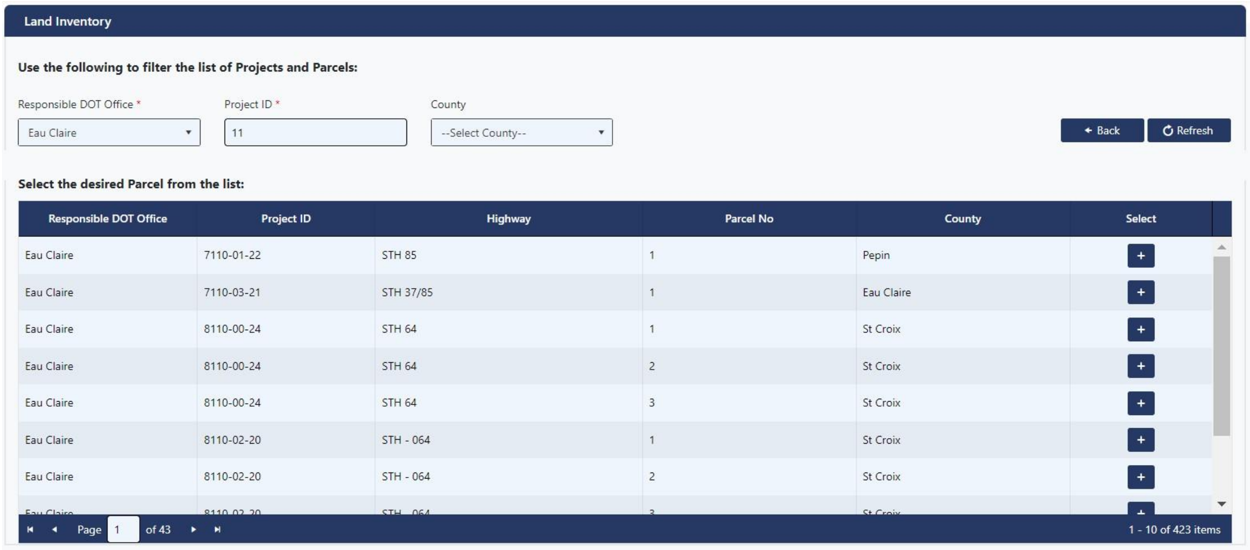
9.1 Add New Land Inventory

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

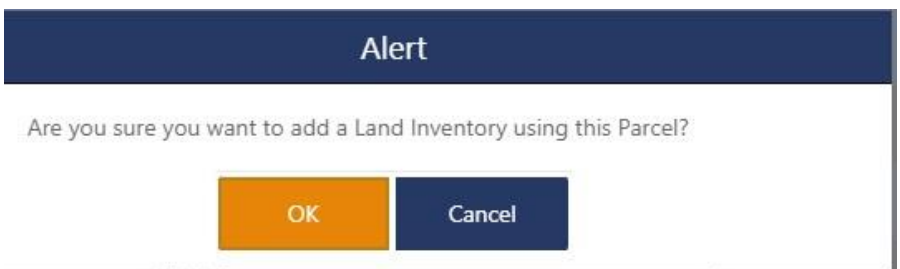
To add a new land inventory record, click the add new button at the top of the main land Inv screen. This will allow you to add a new land property that is not associated with an existing parcel in READS. To add land that is associated with a parcel that was previously entered in READS, click the Add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



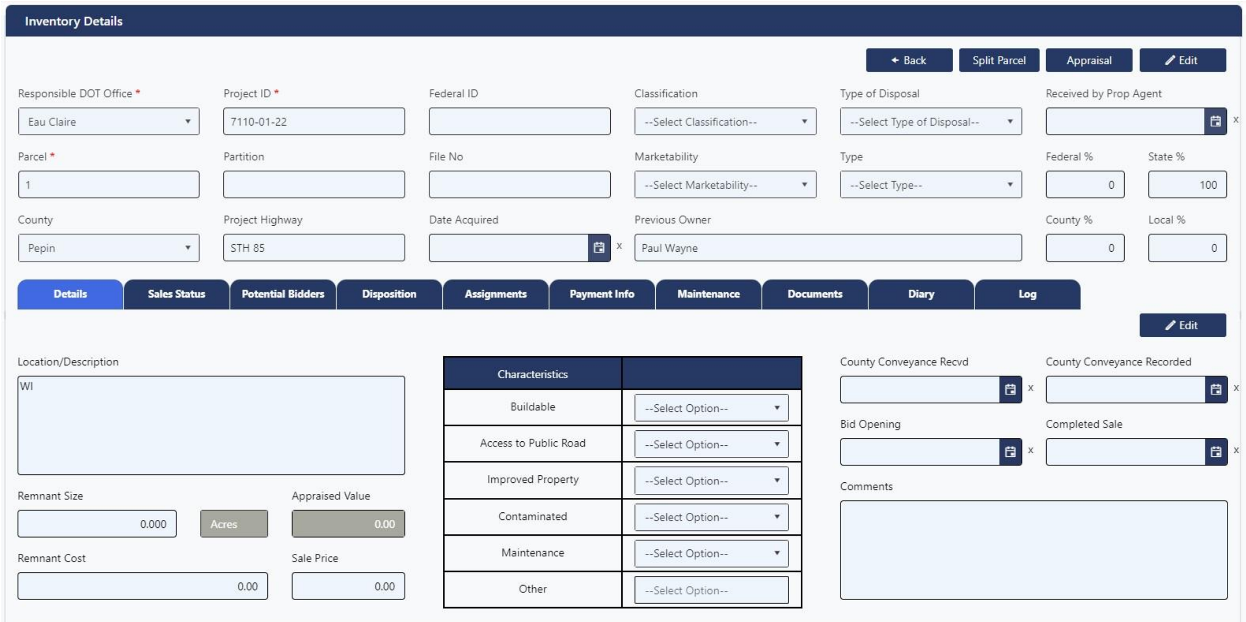
This form is used to locate the parcel you would like to copy into the Land Inventory module. By default, the Responsible office is selected depending on which region office the logged in user is associated with it. You can enter a project id and/or a County to filter the list of parcels you want to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



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:



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:



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

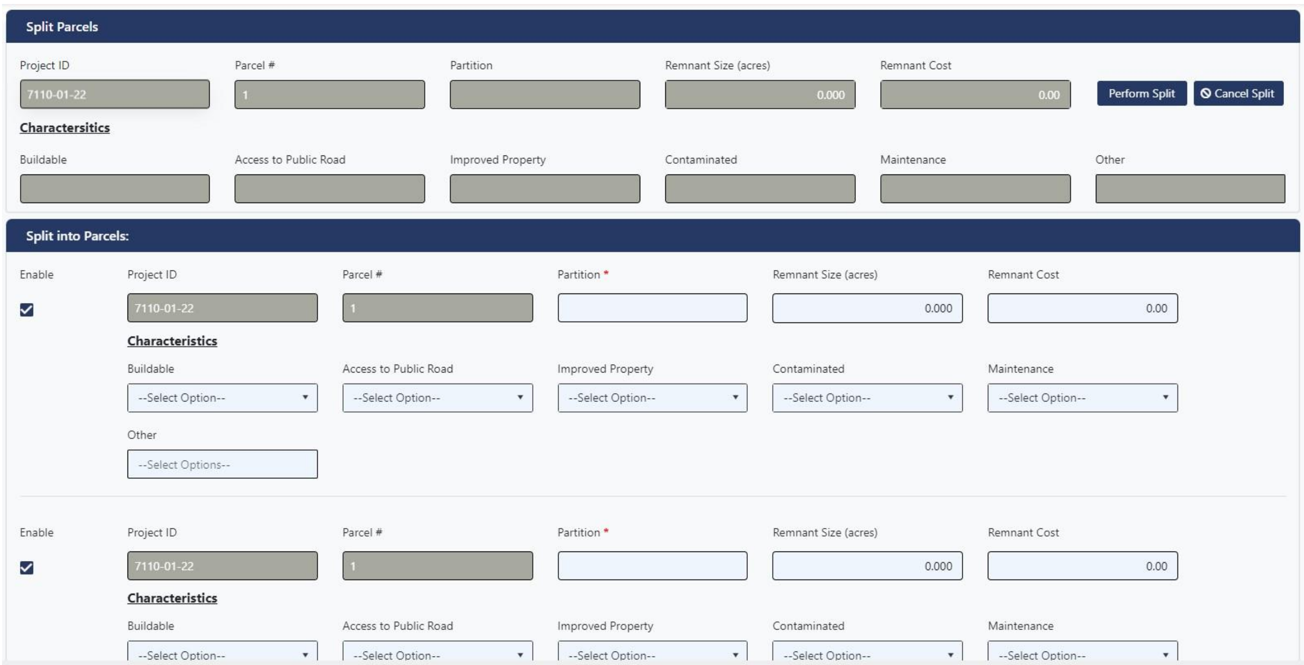
Responsible DOT Office, Project ID, Parcel #, Highway, County, Taxing Unit, Tax Key Nos, Location Desc, Previous Owner, Federal Id, Funding %, Remnant Cost and Remnant Size.

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:



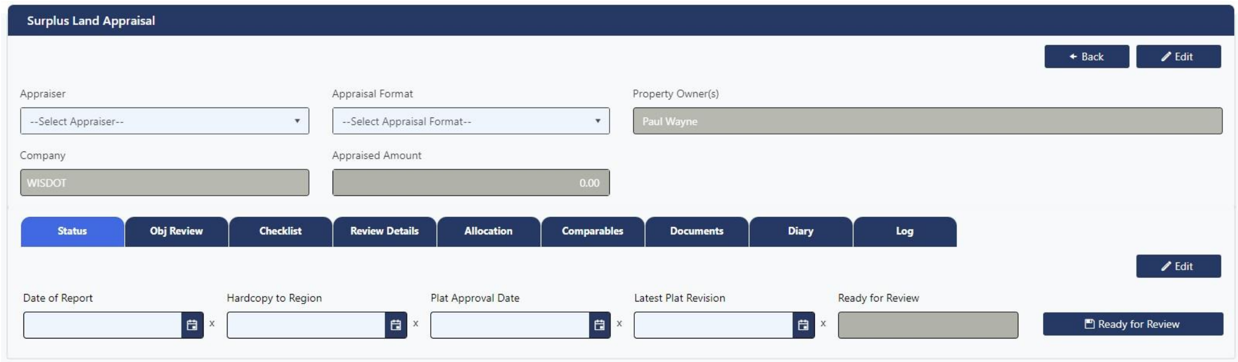
This will allow you to split a parcel up to 4 partitions. The system requires creating at least 2 partitions for a parcel, the Enable checkboxes will already be selected for the first 2 partitions. To split a parcel into more than 2 partitions click the Enable checkbox for other 2 sections as needed. 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

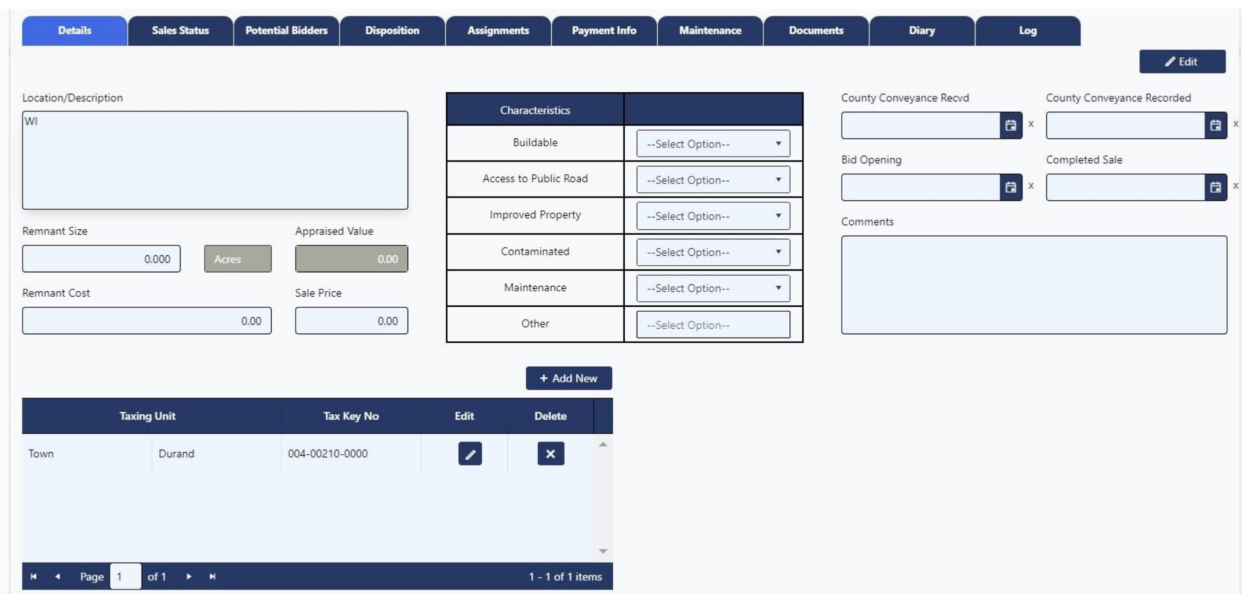
The remnant parcels needs to be appraised again by an Appraiser and also follow the appraisal review process. The Surplus Land Appraisals works exactly the same way as regular appraisals within acquisition. You can click on the Appraisal button to enter the appraisal information for the surplus land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



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

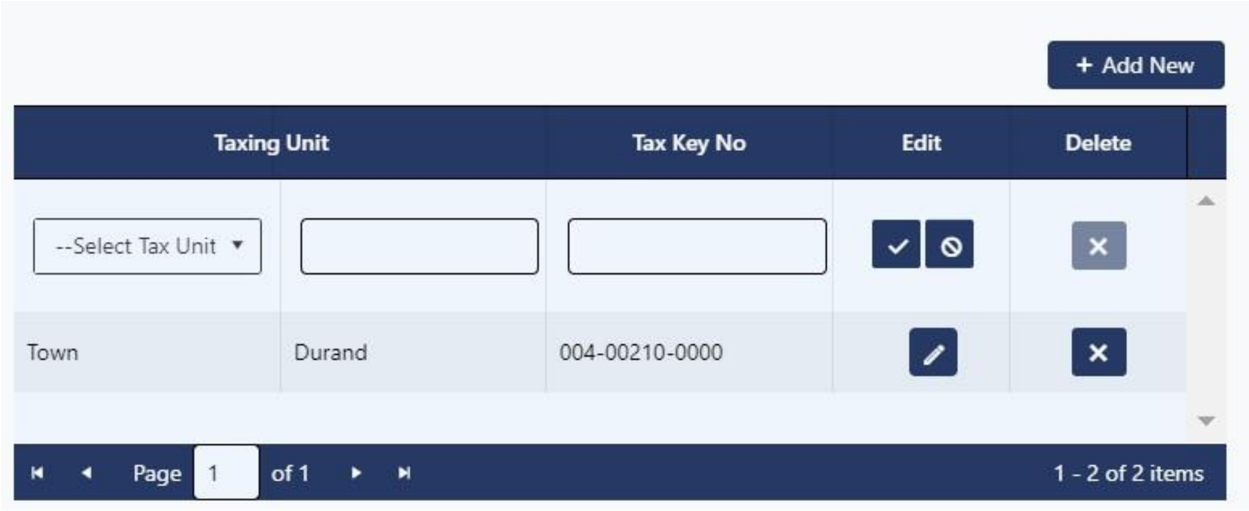
9.2 Details Tab

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:



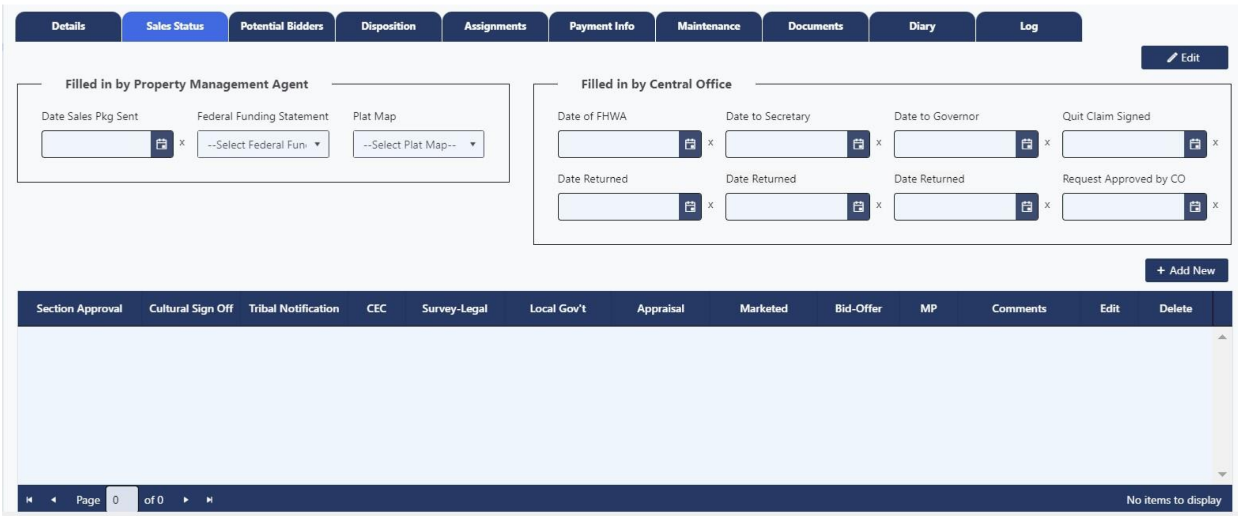
To enter the data on this screen, click the edit button. You can then enter the requested information. Once you are done entering or editing these fields, you can click the save button. If you do not wish to save the changes, click the cancel button.

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:



9.2 Sales Status Tab

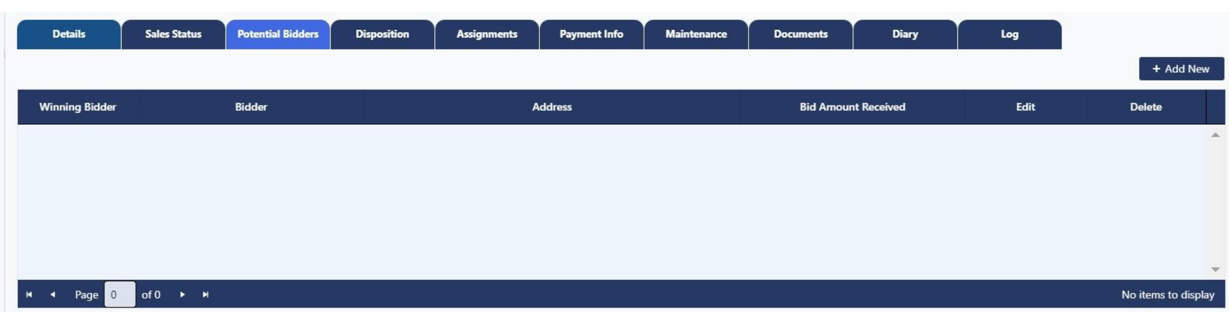
The sales status tab includes details regarding the status of a request to sell surplus land. When you click on the sales status tab, the following screen will open:



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.

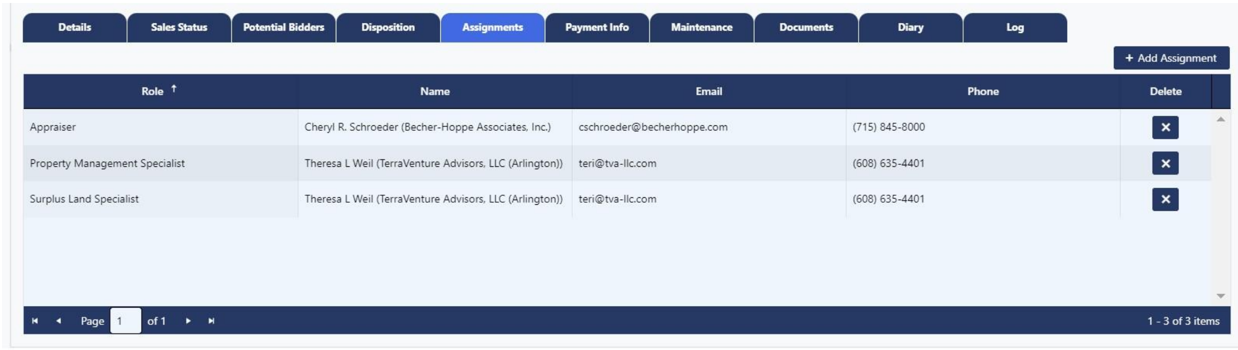
9.4 Disposition Tab

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

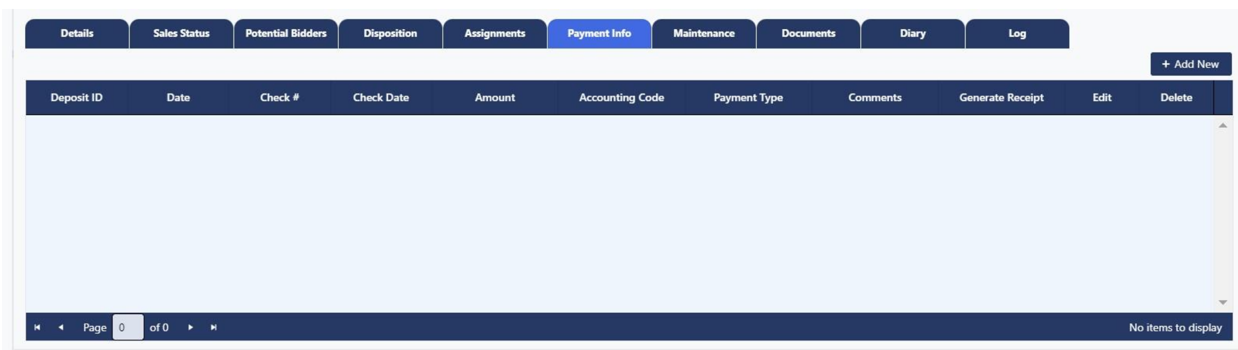
When you click on the assignment tab, the following screen will open:



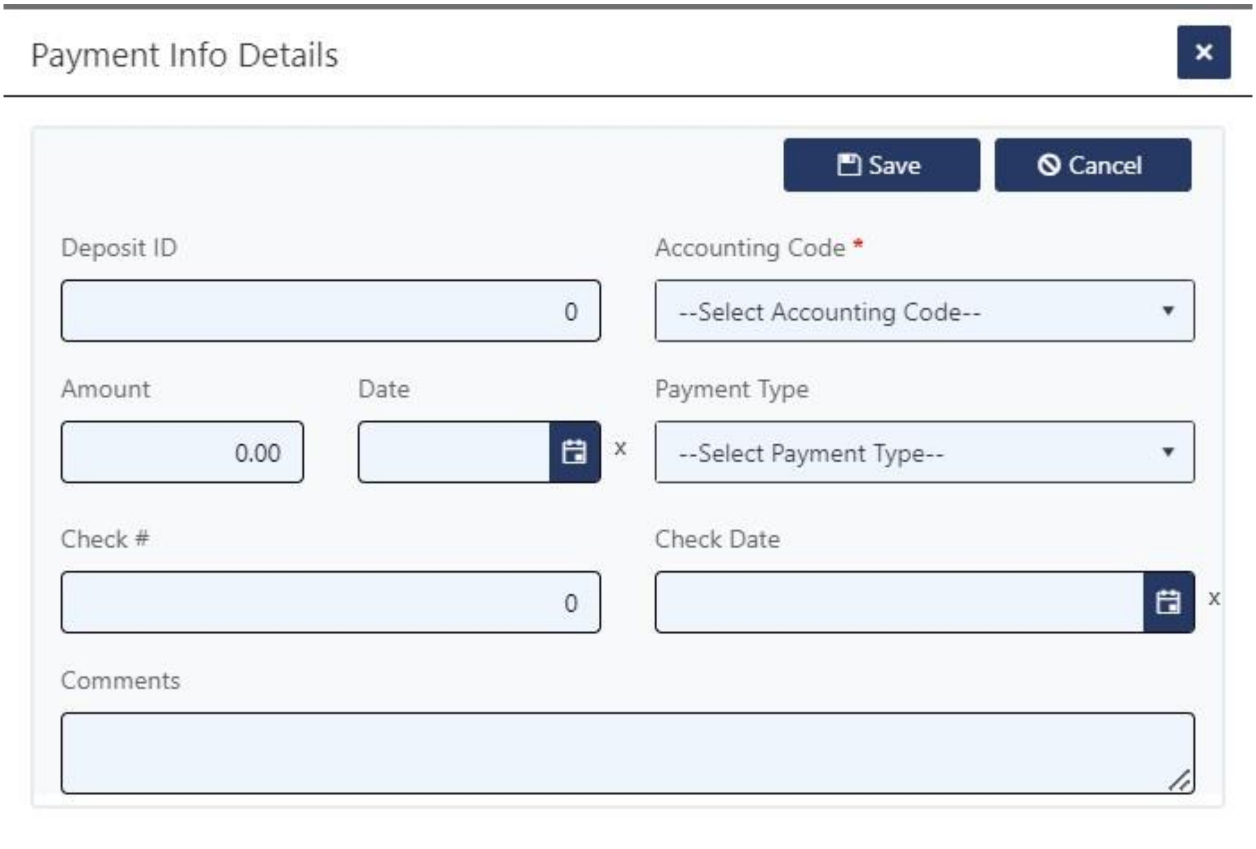
The table identifies role assignments established for the project. To add a new assignment, click the Add Assignment button. To complete adding a new assignment, please see Section 7.2 for instructions on completing this form. To delete an assignment that has been added, click the delete button in the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



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

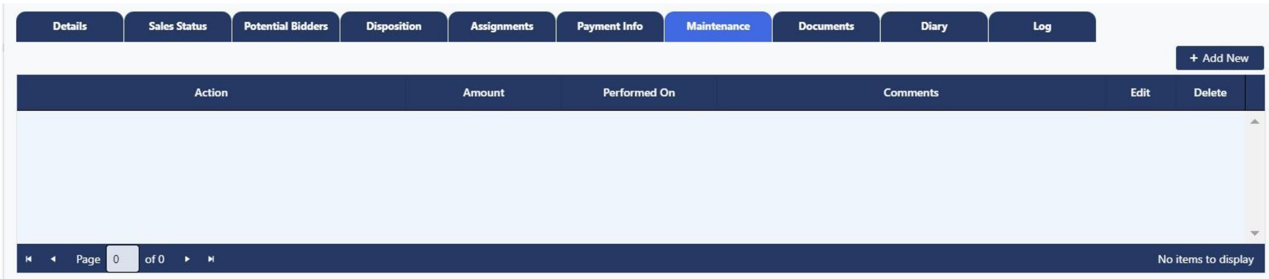


You must choose a Class Code: 9410 – R/E Sale of Land or Land Rights, 9411 – R/E Sale of Building & Personal Property, 9990 – Sales Tax, or 9666 – Miscellaneous Income. You can then enter the Date, Amount and choose the Payment Type. The choices for Payment Type will vary depending on which Class Code 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.

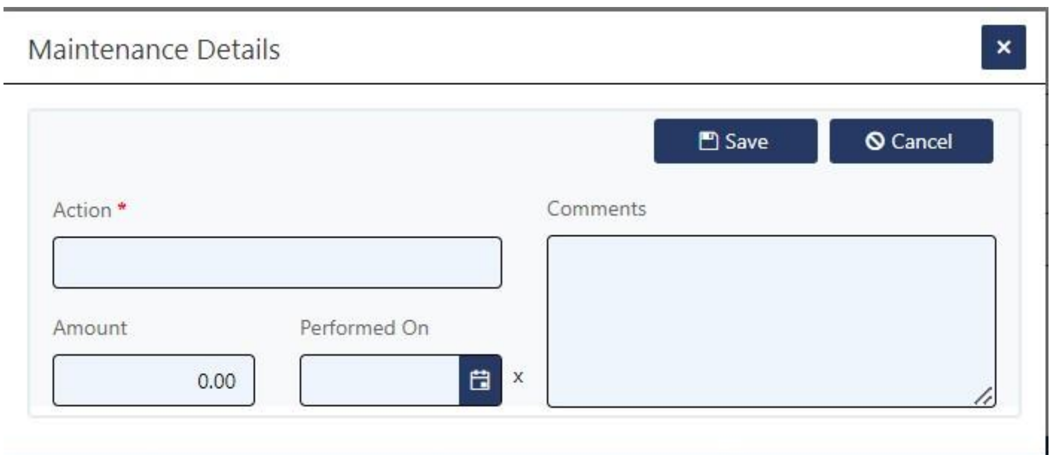
You will return to the payment tab with the list of payments that have been added to the system. There is now a generate button in the "Generate Property Sales/Rental Receipt Transmittal" column to generate either this transmittal. The document will be saved in the Log (Section 13.10). If you wish to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



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.

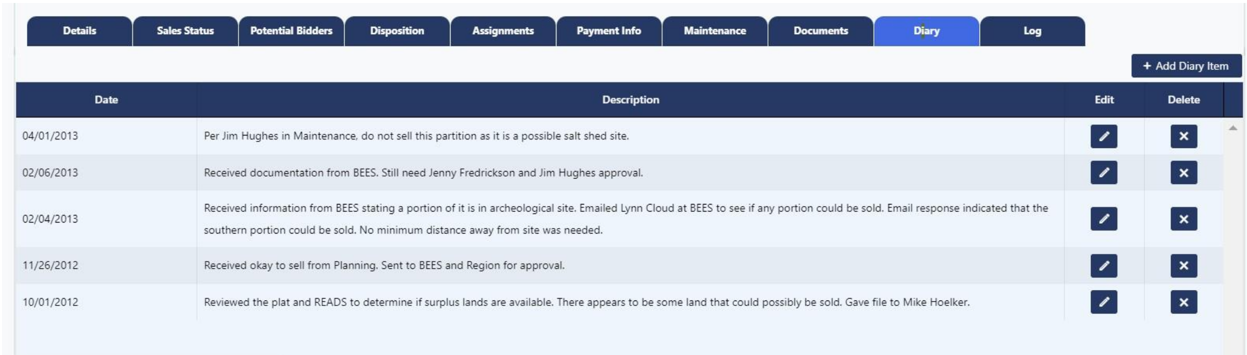
9.8 Documents Tab

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 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:



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.

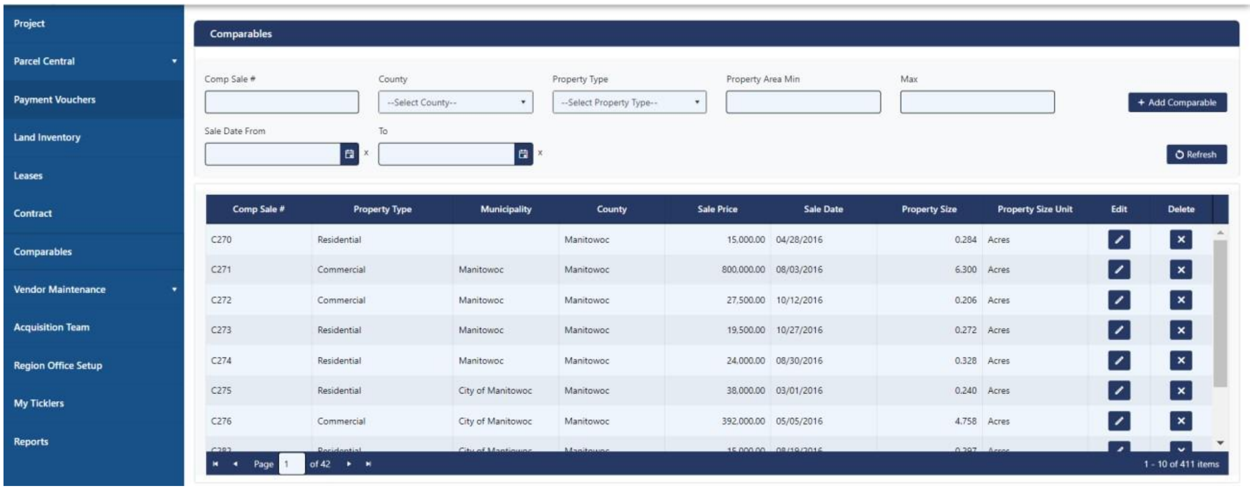
9.10 Log Tab

To access the Land Inventory 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.

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:

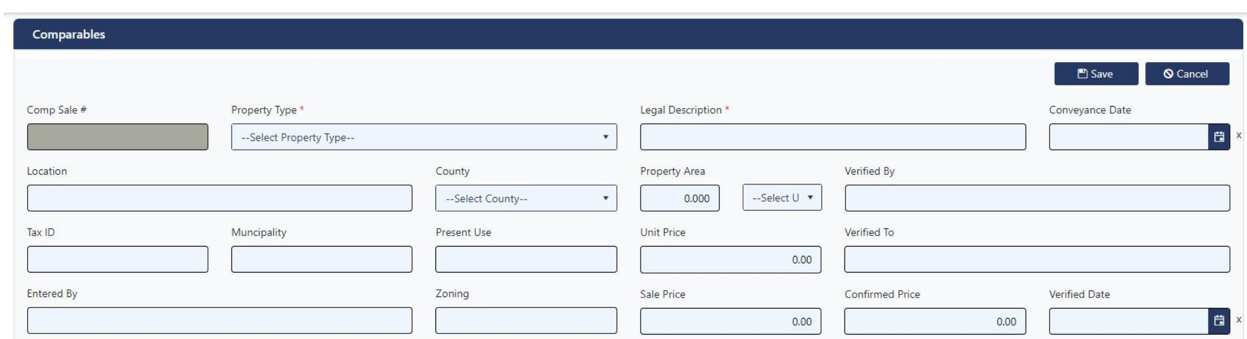


Initially this form shows a list all of the Comparables that have been added to the database. Over time this list will grow, so at the top of the form there are different filters that can be applied to show only the ones you are interested in. You can use as many of the filters as necessary. After entering 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

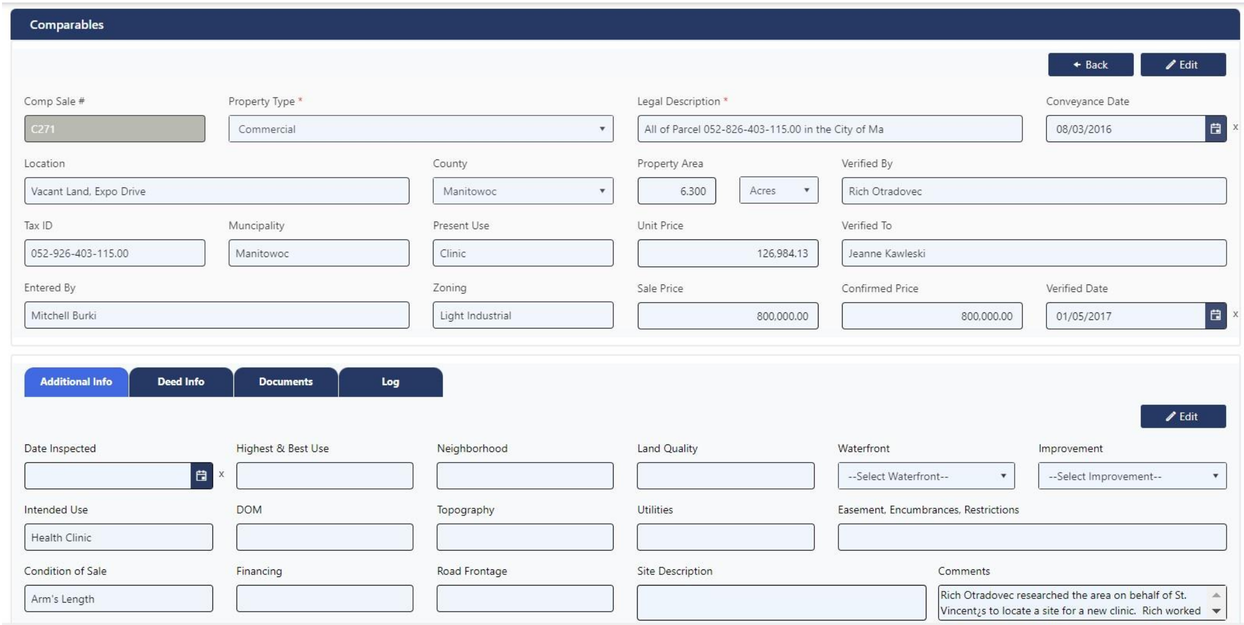
To add a new comparable click the button and the following will open:



The 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.

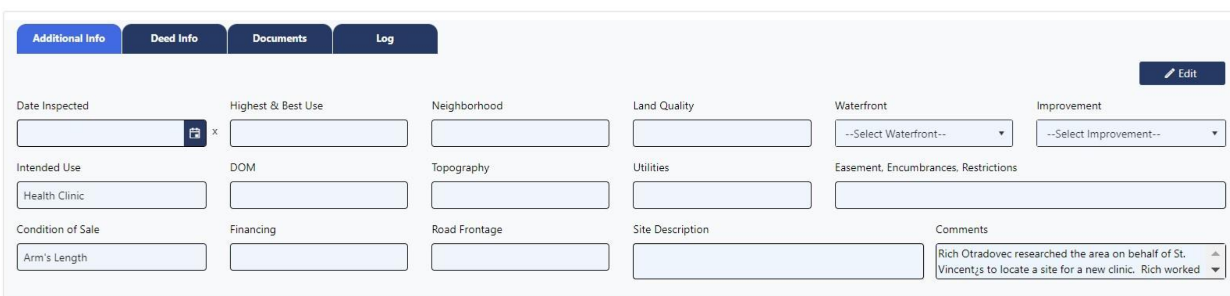
Once you have saved the comparable, several buttons will then appear on the screen as shown below:



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.

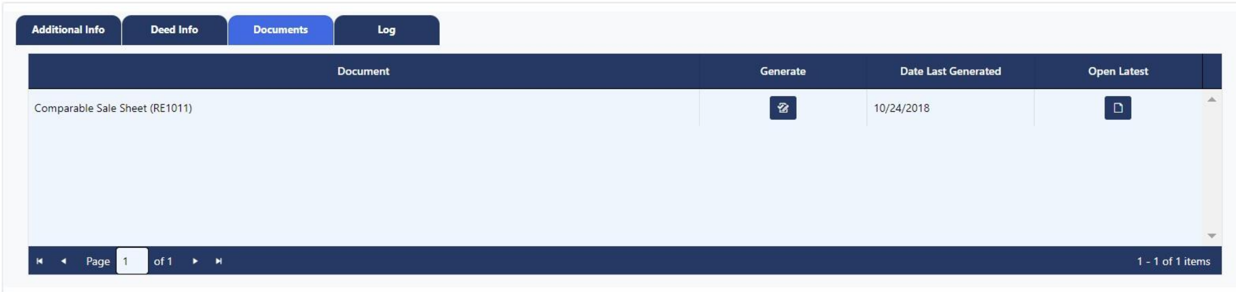
10.2 Additional Info tab

By default this tab will open up when the user comes to the Comparable Details screen. When users click on the following will open:



10.3 Documents Tab

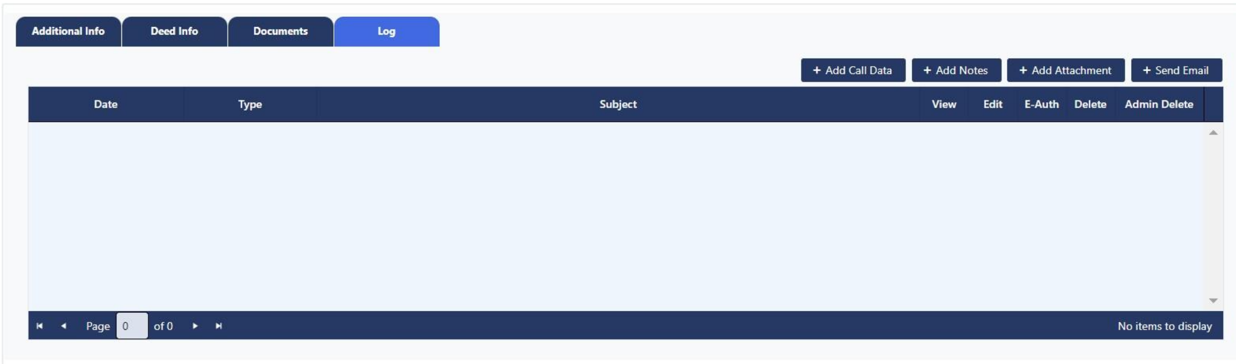
When you click on the documents tab, the following screen will open:



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 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

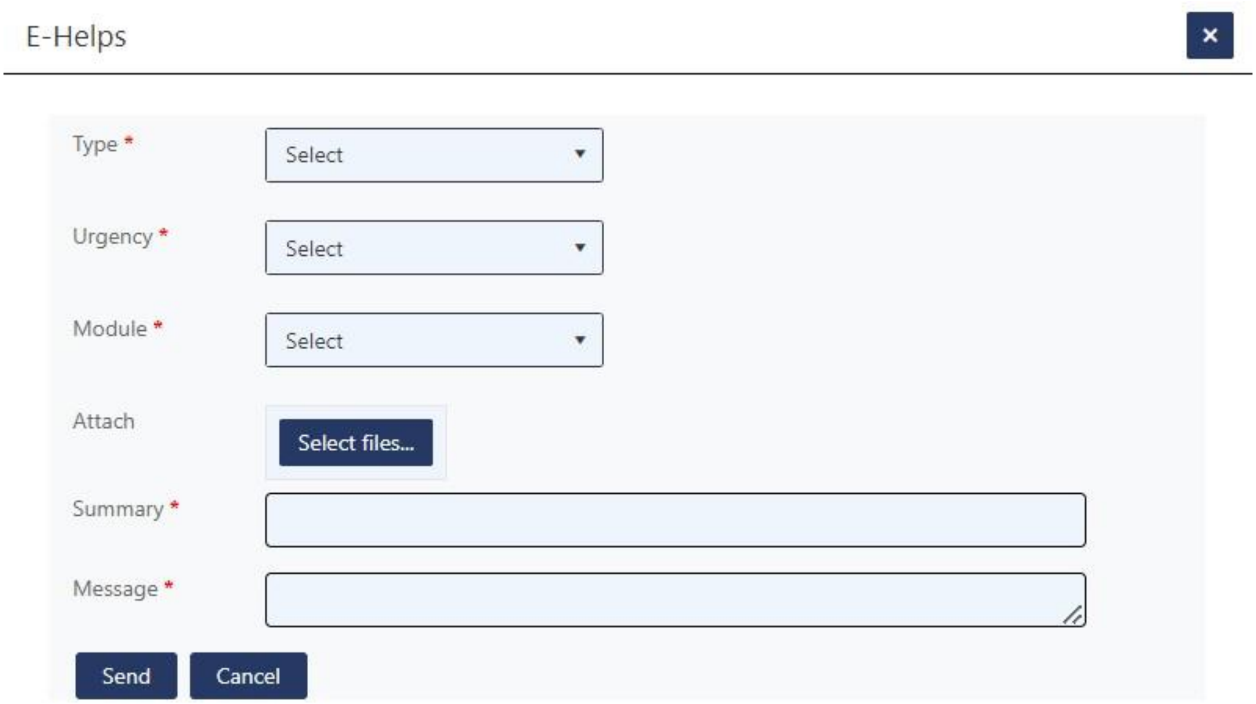
To access the Comparables log, click on the Log tab. The following screen will open:



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:



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.