Transportation Utility Management System (TUMS)

Training and Reference Manual

Utility Facility Owner Details Module



Wisconsin Department of Transportation

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Transportation Utility Management System (TUMS)

Training - Utility Facility Owner Details Module

UTILITY FACILITY OWNER DETAILS SCREEN (UFODS)

The **Utility Facility Owner Details screen (UFODS)** displays detailed information related to one specific Utility Facility Owner (UFO) for one TUMS project. This information is used in DOCR letters and documents, and is also shared with Central Office for Agreements, Change Orders, and Invoice approvals.

This screen has several names: **Utility Facility Owner Details screen**, **UFODS**, **UFO Details screen**, **UFOD screen**. All of these names refer to the same screen, and have the same meaning. The name variations will be used interchangeably throughout this training module.

Figures 1.0 and 2.0 provide an example of a typical **UFODS** in TUMS. The screen has been split into two Figures because it is long and contains a lot of information.

wisconsin dei Daing Bus	PARTMENT OF TRANSPOR	TATION				
					Current User: Lynn Fio	re Norte March
Utility Facility O	wner Details					
Project ID: 5026-	.01-71					
Back						
Legal Name: 0 DBA Name: 0 Facility Type: 0	CenturyLink enturyTel of the Midwest-Kendal EnturyLink Communication Line 222	, ШС				
Contacts Informa	ation: Hide					
Contact Details:					Add Contact	
Type Primary Contact	Name Steve Blado	TUMS ID 7491	Phone(W) (608) 796 - 5543	Email steve.blado@centurytel.com	Delete	
Field Contact	Rick Jari	8632	(715) 537 - 3855	sevelblado geentary en com	Delete	
Compensable a	nd Utility Work Plan Infor	nation: Hide				
Compensable De	-					
	Yes ONO (Yes = adds 30 da	ys to Required Return Date)				
Utility Work Pla	n Details:					
-	ork with another utility: 🍭 Y	es 🔘 No (Yes = adds 30 day	s to Required Return Date)			
Utility moves re	quired: 🖲 Yes 🔘 No					
Work to be done	E During Constructio	n 🔻				
			Save			
UFO Comments	(PMP:Scope Utilities-TUM	S): Hide				
				▲▼100	0 characters left	
			Save			

Figure 1.0 Utility Facility Owner Details screen (UFODS) - Part 1

Utility Number and Agreement Information: Hide	Agreement 1 of 4 << Prev Next>> Add
Utility Number Details:	
R/W ID: 5026 - 01 - 20 UTL #: 20 UA #: Plat/Plan Date: 02/01/2010 (mm/dd/yyyy)	Comp Waived UTL #: 🔲 Comp Waived UA #: 🗌
Plat Type: Transportation Project Plat -	
Release of Rights Form(s) Used: V DT1660-COR DT1661-QCD DT2216-TCE(Non-TPP) DT2217-TCE(TPP) Not Requ	iired
DT1660-COR	
Received OY ON Recorded OY ON	
UA # or UTL # not cleared comments.	1000 characters left
Agreement Details:	
Utility ID: 5026 - 01 - 40 Credits	
Agreement Estimate: \$ 35,000.00	*
FIIPS Estimate: \$	
Agreement Approval Date:	ment: \$ 333.00
Cover Memo Sent Date: 12/04/2013	loss: \$ 4,444.00
Agreement Types: DT1541 Audit DT1542 Lump Sum DT1575 Municipal DT2192 No I	Land Interest
DT2193 Audit-Prior Land Rights 🔲 DT2194 Lump Sum-Prior Land Rights 📃 Other	
Brief discussion of what the agreement covers. Discuss any unusual circumstances. Example Brief discussion for UFODS training module.	1000 characters left
Save Delete	
Change Order Information: Hide	Agreement 1 of 4
Change Order Details:	bbA.
No Change Order exists	
Invoice Information: Hide	Agreement 1 of 4
Invoice Details:	Add
Amount Received by Region Returned by CO Approved by CO \$ 35,000.00 03/01/2013 03/01/2013 03/01/2013	Final Bill Second Move Details N Details
Invoice Information - Without Agreement: Hide	
Invoice Details - Without Agreement: No invoice exists	Add
Back	

Figure 2.0 Utility Facility Owner Details screen (UFODS) – Part 2

Security and UFODS

WisDOT utility staff and **Expert** consultant users are allowed full access to all features and sections on the UFODS. **Viewer** access means a user has view-only access to all information on the UFODS.

Basic and **Intermediate** consultant users have view-only access to all information on the UFODS, with a few exceptions. Full access is allowed to these features: Add Contacts, Delete Contacts, set **Work to be done** value.

- 1. Add and delete **Contacts**. See **Contacts Information** section of this manual for detailed instructions.
- 2. Set the **Work to be done** field value. See **Compensable and Utility Work Plan Information** section of this manual for detailed instructions.

Action Buttons on UFODS

Action buttons are located throughout the **UFO Details screen**. When selected, these buttons initiate a specific action. Each button, and its associated action, is described in Table 1-0.

Back	Hide Show Add Contact Save Delete Add
Button	Description
Back	Click this button to return to the previous screen. This button is displayed on the top-left and lower-left corners of the UFODS.
Hide	Click this button to Hide (remove from view) a section of information on the UFODS. This feature was added because the UFODS is long and contains a lot of information. It allows the user to hide sections they don't want to see; to save some scrolling on this screen. This feature resets each time you leave the UFODS. Settings cannot be saved.
Show	Click this button to Show (bring back into view) a section of information on the UFODS. This feature was added because the UFODS is long and contains a lot of information. It allows users to display sections they had previously hidden. This feature resets each time you leave the UFODS. Settings cannot be saved.
Add Contact	Click this button to add new contacts to the UFODS. Contact types that can be added are: Primary Contact, 1078 Contact, Field Contact and Trans 220 Contact. Once contacts are added, they can be selected and auto-fill in certain letters and forms in the DOCR application.
Save	Click this button to Save editing changes in one section of the UFODS. Users must Save changes for each section on this screen. Clicking Save in one section, will not save changes in a different section.
Delete	Click this button to Delete records in specific sections of the UFODS. Record types that can be deleted are: Utility Number and Agreements. Users can also Delete record types: Change Order, Invoices and Invoices Without Agreements, however, this must be done in secondary screens, under Details for a specific record.
Add	Click this button to Add new records in specific sections of the UFODS. New record types that can be added are: Utility Number and Agreements, Change Orders, Invoices and Invoices Without Agreements.

Table 1-0 Utility Facility Owner Details screen (UFODS), Action Buttons

How to Open the UFODS

To open a specific utility's **UFO Details screen** follow these steps:

1. Click to select a **project** from the **TUMS Search screen**.

PARTMENT OF T	TRANSPORTATION					
ew Effort Delete	<u>e Effort Agreements Invoices Milestone</u>	e Summary Logoff				
on Utility Maı	nagement System (TUMS) Searc	h				
Construction	Sharon - Walworth	Walworth	STH 67	05/01/2029	Remove	_
Construction	T Chilton, CTH E	Calumet	CTH E	05/01/2013	Remove	
Construction	T Chilton, CTH F	Calumet	CTH F		Remove	
Construction	Village Of Sister Bay	Door	STH 42	02/01/2015	Remove	
Construction	Lavalle - Mauston	Juneau	STH 58	02/01/2010	Remove	
Construction	Osage Avenue, Town Of Wellington	Monroe	TWN RD	01/17/2006	Remove	
Construction	Readstown - Viola	Vernon	STH 131	11/01/2012	Remove	
Construction	Rio - CTH G	Columbia	CTH SS	11/01/2013	Remove	
Design	USH 18 - Boscobel	Grant	STH 133		Remove	
Construction	Prairie Du Sac - Merrimac Road	Sauk	STH 78	08/01/2008	Remove	
Construction	Viola-cth G	Richland	STH 56	08/01/2007	Remove	
Construction	Village Of Cazenovia	Richland	STH 58	02/01/2010	Remove	
Construction	T Fort Winnebago, Clark Road	Columbia	TWN RD	11/01/2013	Remove	
	Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction Construction	Construction Sharon - Walworth (TUMS) Searce Construction Sharon - Walworth (TUMS) Searce Construction T Chilton, CTH E Construction T Chilton, CTH F Construction T Chilton, CTH F Construction Coll Stater Bay Construction Lavalle - Mauston Osage Avenue, Town Of Wellington Construction Readstown - Viola Construction Construction Rio - CTH G Design US1 B - Boscobel Construction Prairie DU Sac - Merrimac Road Construction Viola - CTH G Construction	Construction Sharon - Walworth Milestone Summary Locoff Construction Sharon - Walworth (TUMS) Search Construction Sharon - Walworth Calumet Construction T Chilton, CTH E Calumet Construction T Chilton, CTH F Calumet Construction T Chilton, CTH F Calumet Construction T Chilton, CTH F Calumet Construction Ulage Of Sister Bay Door Construction Usale - Mauston Juneau Construction Readstown - Viola Vernon Construction Rio - CTH G Columbia Design USH 18 - Obscobel Grant Construction Viola - Chilton Sauk Construction Viola- Chilton Richland Construction Viola- Chilton Richland	Construction Sharon - Walworth Invoices Milestone Summary Logoff Construction Sharon - Walworth (TUMS) Search Construction Sharon - Walworth Walworth Construction T Chilton, CTH E Calumet Construction T Chilton, CTH F Calumet Construction T Chilton, CTH F Calumet Construction T Chilton, CTH F Calumet Construction Uilage Of Sister Bay Door STH 42 Construction Uavalle - Mauston Juneau STH 58 Construction Readstown - Viola Vernon STH 131 Construction Readstown - Viola Vernon STH 131 Construction Rio - CTH G Columbia Chiltos Design UGH 18 - Soscobel Grant STH 78 Construction Viola- Cth G Richland STH 56 Construction Viola- Cth G Richland STH 56	Construction Sharon - Walworth Walworth STH 67 05/01/2029 Construction Sharon - Walworth (TUMS) Search Construction T Chilton, CTH E Calumet CTH E 05/01/2013 Construction T Chilton, CTH F Calumet CTH E 02/01/2013 Construction T Chilton, CTH F Calumet CTH E 02/01/2013 Construction Uilage Of Sister Bay Door STH 42 02/01/2015 Construction Uavale - Mauston Juneau STH 58 02/01/2010 Construction Readstown - Viola Vernon STH 131 11/01/2012 Construction Rio - CTH G Columbia CTH 55 11/01/2013 Design USH 18 - Boscobel Grant STH 78 08/01/2008 Construction Viola - CH G Richland STH 56 08/01/2007 Construction Viola - CH G Richland STH 58 02/01/2010	Construction Sharon - Walworth Uture (TUMS) Search Construction Sharon - Walworth (TUMS) Search Construction Sharon - Walworth Calumet CTH 6 05/01/2029 Remove Construction T Chilton, CTH E Calumet CTH E 02/01/2013 Remove Construction T Chilton, CTH F Calumet CTH E 02/01/2015 Remove Construction T Chilton, CTH F Calumet CTH E 02/01/2015 Remove Construction Usage Of Sister Bay Door STH 42 02/01/2016 Remove Construction Lavale - Mauston Juneau STH 58 02/01/2016 Remove Construction Readstown - Viola Vernon STH 131 11/01/2012 Remove Construction Rio - CTH G Columbia CTH S11 11/01/2013 Remove Construction Praine Du Sac - Merrimac Road Sauk STH 78 08/01/2008 Remove Construction Viola - cth G Rithand STH 58<

2. The project's **Effort Summary screen** (ESS) opens. A list of utility companies is displayed in the bottom-left portion of the screen.

wisconsin departm Iloing Busines		ORTATION										
TUMS Search Add Util	ity Delete Utility	Add Proje	ct Comp	ensable Log	DOCR-Mana	age Pack	ets <u>Manaq</u>	e Tracking	Print Pag	e Logoff		
										Current	User: Lyni	n Fiore
TUMS Utility Coor	dination Effo	rt Summ	ary									
Consultant Utility Coo	ordinator: Brad	Basic			Co	mments	Refi	resh				
Primary Utility Coordi	inator: Lynn	Fiore										
Utility Oversight Cont		Lonaley										
ouncy oversigne com		Longiey										
Projects: <u>5026-01-71</u>												
Design Project ID:	5026-01-00		Lettin	g: 04/11/2006				Ea	rliest Possil	ole PS&E:	xx/x	ox/xxxxx
Construction Project ID	: 5026-01-71		Impro	ovement Conce	ept: Bridge Re	placement		PS	&E:		01/1	17/2006
Title:	Osage Avenue, To	wn Of Welling						Fin	al Task List	Complete:	xx/x	cx/xxxx
Limits:	Billings Creek Br &	Appr/B410269		ired Project Lea					aion Review			x/xxxx
Highway:	TWN RD			des extra days for (-			al DT1080 (x/xxxx
County:	Monroe		Requi	ired Project Pla	n Mail Date	: 04/21/20	05		ility Coordir			
Region:	SW		MSR 1	Fracking: 🔽				Ut	liity Coordin	lation Comp	pietea: <u>xx/x</u>	<u>(X/XXXX</u>
<u>details</u>			Trans	220 🗹 Non-T	rans 220							
	1	1			1		_					
Utility	-		Notification			8 Projec			Vork Plan			lan Approval
Name	Туре	Sent 220.04(3)	Acknow rec	Sys maps or desc rec 220.04(5)	Sent 220.05(1)		Revised Sent 220.05(12)	Return	Actual Return	Denied &Return Utility		Approved/ Start Work Notice/ Sent 220.05(7)(9)
CenturyLink	Communication Line	12/01/2013	12/04/2013	12/04/2013	12/01/2013			03/31/2014				
CenturyLink	Communication Line	11/07/2013			09/01/2009		05/15/2010	12/03/2013	12/01/2013	12/02/2013	12/04/2013	12/05/2013
	Communication Line	11/23/2013			01/01/2013			05/01/2013				
Vernon Electric Coop	Electricity	NOP										

3. Click to select a specific utility company name.

wisconsin departm The The The State State		ORTATION	1	•								acolus
TUMS Search Add Util	ity <u>Delete Utility</u>	Add Proje	ect Comp	ensable Log	DOCR-Man	age Pack	ets <u>Mana</u> g	e Tracking	Print Pag	e Logoff		
			_							Current	User: Lyn	n Fiore
TUMS Utility Coor	dination Effo	rt Summ	ary									
Consultant Utility Co	ordinator: Brad	Basic			Co	mnents	Ref:	resh				
Primary Utility Coord												
Utility Oversight Con	Laura	Longley										
Projects: <u>5026-01-71</u>												
Design Project ID:	5026-01-00		Lettir	ng: 04/11/2006				Ea	rliest Possil	le PS&E:	xx/x	x/xxxx
Construction Project ID	5026-01-71		Impr	Improvement Concept: Bridge Replacement, Preservation				PS	PS&E: 01/17/200 Final Task List Complete: xx/xx/xxx			7/2006
Title:	Osage Avenue, To	wn Of Welling	ton Preser					Fir				· ·
Limits:	Billings Creek Br &	Appr/B41026	Requ	ired Project Lea	ad Time: 90	days			Region Review Complete: xx/xx/xxxx			
Highway:	TWN RD		(Exclu	(Excludes extra days for Comp or Coordinating Work) Required Project Plan Mail Date: <u>04/21/2005</u> MSR Tracking:					Final DT1080 (USR) Complete: <u>xx/xx/xxxx</u> Utility Coordination Completed: <u>xx/xx/xxxx</u>			
County:	Monroe		Requ									
Region:	SW		MSR					Ut				
<u>details</u>				5 220 🗹 Non-T	rans 220 🗌]						
Utility		1077	Notification	(60 days)	10	78 Project	t Plan	Utility V	Vork Plan	Ut	ility Work P	'lan Approval
Name	Туре	Sent 220.04(3)	Acknow rec	Sys maps or desc rec 220.04(5)	Sent 220.05(1)		Revised Sent 220.05(12)	Required Return 220.05(4)	Return	Denied &Return Utility	Revised Received 220.05(7)	Approved/ Start Work Notice Sent 220.05(7)(9)
CenturyLink 🗲 —	Communication Line	12/01/2013	12/04/2013	12/04/2013	12/01/2013			03/31/2014		<u> </u>		
CenturyLink	Communication Line	11/07/2013			09/01/2009		05/15/2010	12/03/2013	12/01/2013	12/02/2013	12/04/2013	12/05/2013
Mediacom LLC Wiscons	Communication Line	11/23/2013			01/01/2013			05/01/2013				
Vernon Electric Coop	Electricity	NOP										

4. The **UFO Detail screen** for selected utility company opens.

TUMS Training | Utility Facility Owner Details Module | Update: March 2014

Information Sections on UFODS

The UFOD screen is divided into "sections" of related information (data). Each section is described below.

Utility Details

This section displays detailed information about one specific utility company such as legal entity names, addresses, emails and phone numbers.

1. Click <u>Utility Details</u> link to see a secondary screen that displays all information (everything in TUMS tables) about one utility company.

Utility Details	
Short Name:	CenturyLink
Legal Name:	CenturyTel of the Midwest-Kendall, LLC
DBA Name:	CenturyLink
Facility Type:	Communication Line
TUMS ID:	322
Phone Number	:
Email:	
Address:	

Contacts Information

This section displays detailed information about a utility company's contacts such as contact types, names, IDs, phone numbers and emails. You can also add new contacts and delete contacts here.

- 1. Click the Add Contact button to add a new contact for this utility.
- 2. Click the link for a specific <u>Name</u> to see all detail information about that contact.
- 3. Click the <u>Delete</u> link at far-right of contact's name to delete a specific contact.

Note that the contact **Type** "Primary Contact" cannot be deleted unless the name was manually added by user and the name is <u>not</u> linked to any **TUMS Spatial Editor** data.

Contacts Informatio	n: Hide				
Contact Details:					Add Contact
Туре	Name	TUMS ID	Phone(W)	Email	Delete
Primary Contact	Steve Blado	7491	(608) 796 - 5543	steve.blado@centurytel.com	
Field Contact	Rick Jari	8632	(715) 537 - 3855		Delete

Primary Contacts

In general, contacts are staff from the utility company assigned to the current TUMS project. A **Primary Contact** is the main contact person at a utility company assigned to receive Trans 220 notices from WisDOT. Only one **Primary Contact** can be assigned to a utility company on the UFODS.

On the UFODS, a **Primary Contact** is typically already assigned for a utility company and does not need to be added. **Primary Contacts** for a utility are defined in the **TUMS Spatial Editor** application which links to TUMS. If defined, the **Primary Contact** will automatically display on the UFODS, and users cannot delete them. In this case, a <u>Delete</u> option is not available on UFODS for their record, as shown here:

Contacts Informatior	Hide				
Contact Details:					Add Contact
Туре	Name	TUMS ID	Phone(W)	Email	Delete
Primary Contact	Steve Blado	7491	(608) 796 - 5543	steve.blado@centurytel.com	\rightarrow
Field Contact	<u>Rick Jari</u>	8632	(715) 537 - 3855		Delete

In TUMS, users cannot add a **Primary Contact** if one already exists. However, if a **Primary Contact** does not exist, users can add one manually. This may be necessary because utility coordination work needs to be done quickly-before the **Primary Contact** can be defined in the **TUMS Spatial Editor** application.

Primary Contacts can be deleted only if they were manually added by a user, and are not defined in the **TUMS Spatial Editor** application. If they can be deleted, a <u>Delete</u> option will appear at the far-right of their contact record, as shown here:

Contacts Information	n: Hide				
Contact Details:					Add Contact
Туре	Name	TUMS ID	Phone(W)	Email	Delete
Primary Contact	Brand Smith	6044	(608) 842 - 1705	brandsmith@alliantenergy.com	Delete

After a manual-add, if the **Primary Contact** is later defined in the **TUMS Spatial Editor** application, TUMS will automatically link to it (with programming code behind the scenes). At this point, the **Primary Contact** can no longer be deleted.

If added manually, users should contact their local **Spatial Editor** to have the **Primary Contact** added in the **TUMS Spatial Editor** application.

How to Add Contacts

To add contacts on the UFODS, follow these steps:

- 1. Contacts are added in the **Contacts Information** section of UFODS.
- 2. Click Add Contact button to begin add process.

Contracto Informatio	n. Hide	U			
Contacts Information	on: Hitle				
Contact Details:				Add Contact	
Type Name		TUMS ID	Phone(W)	Email	Delete
Primary Contact	Steve Blado	7491	(608) 796 - 5543	steve.blado@centurytel.com	
Field Contact	Chris Hardy	476968	(920) 582 - 4381	publicworks@winneconnewi.gov	Delete

- 3. Enter a contact's last name in the Last Name box.
- 4. Click the **Search** button.

Search Contacts				
First Name:				
Last Name: jari				
Search Back				

5. On the **Search Results** screen, either click the name of desired participant, or click the **Search Again** button to enter a different **Last Name**.

Search Results						
Name Jari, Rick Jarvis, Harlow	Employer Barron Light And Water Utility Charter Communications					
Search Again						

On the Add Contact screen, click the down-arrow and select a Contact type from the dropdown list.
 Contact type options are: Primary Contact, Field Contact, 1078 Contact and Trans 220 Contact.
 Note that users cannot add a Primary Contact or 1078 Contact if one already exists.

Add Contact			
Rick Jari TUMS ID: 8632 1303 E Division Ave Barron, WI 54812 USA (715) 537-3855			
Employer: Barron Light And Water Utility			
Contact type:			
Add Back Back to Results			

- 7. Click the **Add** button to add this participant.
 - a. Or, click **Back** button to return to previous screen.
 - b. Or, click the **Back to Results** button to return to the **Search Results** screen.
- 8. Contact is added to the Contacts Information section on UFODS.

Contacts Information: Hide							
Contact Details: Add Contac							
Туре	Name	TUMS ID	Phone(W)	Email	Delete		
Primary Contact	Steve Blado	7491	(608) 796 - 5543	steve.blado@centurytel.com			
Field Contact	Chris Hardy	476968	(920) 582 - 4381	publicworks@winneconnewi.gov	Delete		
Field Contact	<u>Rick Jari</u>	8632	(715) 537 - 3855		<u>Delete</u>		

How to Delete Contacts

On the UFODS, contact **Type** options are: **Primary Contact**, **Field Contact**, **1078 Contact** and **Trans 220 Contact**.

A **Primary Contact** for a utility is typically defined in the **TUMS Spatial Editor** application which links to TUMS. If defined there, the **Primary Contact** name automatically displays on the UFODS and cannot be deleted. In this case, there is no <u>Delete</u> option at the far-right of the primary contact record.

Primary Contacts can only be deleted if they were manually added by a user, and are not defined in the

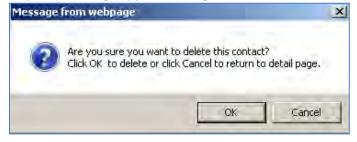
TUMS Spatial Editor application. If they can be deleted, a <u>Delete</u> option will appear at the far-right of their contact record. See **Primary Contacts** in this manual for more information.

All other contact **Types** (**Field**, **1078** and **Trans 220**) can be deleted at any time. To delete a utility contact, follow these steps:

1. In the **Contacts Information** section of the UFODS, click the <u>Delete</u> function located at the far-right of a contact's record.

Contacts Information: Hide							
Contact Details:				Add Contact			
Туре	Name	TUMS ID	Phone(W)	Email	Delete		
Primary Contact	Steve Blado	7491	(608) 796 - 5543	steve.blado@centurytel.com			
Field Contact	Chris Hardy	476968	(920) 582 - 4381	publicworks@winneconnewi.gov -	> Delete		
Field Contact	<u>Rick Jari</u>	8632	(715) 537 - 3855		Delete		

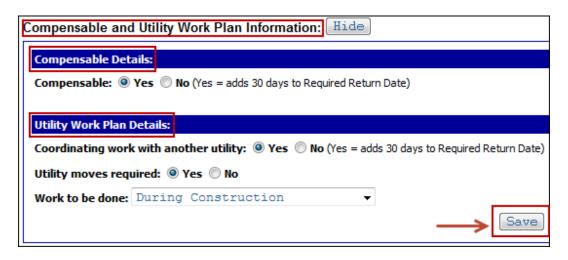
2. A system message appears asking the user to confirm the delete action.



- 3. Click **OK** button to delete the contact. In this case, the contact is removed from UFODS.
 - a. Or, click **Cancel** button to stop the delete action and return to UFODS. In this case, the contact remains on UFODS.

Compensable and Utility Work Plan Information

This section is divided into two sub-sections: **Compensable Details** and **Utility Work Plan Details**. Default values for fields are **No**, or **null** (no value selected). In this section, remember to click the **Save** button so values are saved to the database tables, otherwise, the changes will be lost and need to be re-entered.



Business rules for this section:

- If user selects **Yes** for the fields **Compensable** or **Coordinating Work with Another Utility**, an additional 30 days are added to the **Required Return** date for the **Utility Work Plan**.
- If <u>both</u> fields are set to **Yes**, then 30 days <u>total</u> are added (not 60 days) to the **Required Return** date.
- If <u>either</u> of the fields are set to **Yes** for <u>any</u> utility on a project, an additional 30 days are added to the **Required Return** date for <u>all</u> utilities on that project, whether the utilities are compensable or not.
- The additional 30 days are also added to the **Required Return** date in 1078 letters, DT1078 form and DT2236 form in DOCR.

In this section, the values for **Compensable**, **Coordinating work with another utility** and **Utility moves required** are imported and displayed in PMP (another WisDOT application). The values are displayed in PMP under: **Scope: Utilities-TUMS** and on some PMP reports.

Also, the value for **Compensable** is used in the Milestone Summary Report (MSR), as part of the criteria for determining alerts for Compensable Parcel Status.

How to Set the Work to be Done Value

The **Work to be done** field refers to the timing of the utility coordination work. In other words, when will the utility coordination work be done? This setting will appear on the DT1080, *Utility Status Report* in DOCR, and possibly other documents in the future.

To set a value for the **Work to be done** field in the **Utility Work Plan Details** section on UFODS, follow these steps:

- 1. Work to be done is set in the Compensable and Utility Work Plan Information section of UFODS.
- Click the down-arrow to select value from Work to be done dropdown menu.
 Possible values are: Prior to Construction, During Construction, Prior-to/During Construction and None.
- 3. Click the Save button in Utility Work Plan Details section of UFODP to save value selected.

Compensable and Utility Work Plan Information: Hide				
Compensable Details:				
Compensable: [®] Yes [®] No (Yes = adds 30 days to Required Return Date)				
Utility Work Plan Details:				
Coordinating work with another utility: 🌑 Yes 🖷 No (Yes = adds 30 days to Required Return Date)				
Utility moves required: Yes No				
Work to be done: Prior to Construction				
Save				

4. A "...updated successfully" system message displays in red text at top of UFODS.



UFO Comments (PMP: Scope Utilities-TUMS)

In this section users can enter a comment that is specific to the utility company. The comment is limited to 1000 characters. Remember to click the **Save** button so the comment is saved to the database tables, otherwise, the changes will be lost and need to be re-entered.

In the future, this comment field is intended to be imported and displayed in PMP (another WisDOT application); however, it is not being imported to PMP currently.

[UFO Comments (PMP:Scope Utilities-TUMS): Hide			
		*	1000	characters left
	> Save			

Utility Number and Agreement Information (UNAI)

A Utility Facility Owner (UFO) may be required to move their utility facilities in order to accommodate a WisDOT highway improvement project. When this happens, the UFO may or may not be eligible for compensation. Refer to the WisDOT Guide to Utility Coordination (UC Guide) for eligibility requirements.

This section stores information related to utility agreements between WisDOT and one UFO-if the UFO is eligible for compensation. A UFO may waive compensation, or WisDOT may have multiple agreements with one UFO. Multiple agreements can be entered in this section of the UFODS. If a UFO is non-compensable, this section does not need to be completed.

The information stored here will auto-fill onto many screens, forms, letters and legal documents in TUMS/DOCR. Some of these screens and documents include: Compensable Log screen, *Cover Memo for Agreements*, DT1080 *Utility Status Report*, DT1541 *Audit Agreement*, DT1542 *Lump Sum Agreement*, DT1660 *Conveyance of Rights in Land*, DT1575 *Municipal Agreement*, etc. Others will be added in the future.

Information stored in this section may be used as partial criteria for alerts on the Milestone Summary Report (MSR).

Also, Central Office (CO) staff will review the data here when approving agreements. CO also runs reports that track **agreement approvals** and **compensation waived** by utilities. These reports include data stored in this section of the UFODS.

It is important that this section be completed as thoroughly as possible for compensable utilities.

In this section, remember to click the **Save** button so changes are saved to the database tables, otherwise, the changes will be lost and need to be re-entered.

This section is divided into two sub-sections: **Utility Number Details** and **Agreement Details**. Figure 3.0 depicts a typical example the **UNAI** section.

Utility Number and Agree	ement Information: Hide	Agreement 1 of 4 << Prev <u>Next>></u> <u>Add</u>
Utility Number Details:		
R/W ID: 5026 - 01 - 20) UTL #: 20 UA #: Plat/Plan Date: 02/01/	2010 (mm/dd/yyyy) Comp Waived UTL #: 🔲 Comp Waived UA #: 🗌
Plat Type: Transporta	ation Project Plat 👻	
Release of Rights Form(s)	Used: 🔽 DT1660-COR 🔲 DT1661-QCD 🗐 DT2216-TCE(No	on-TPP) 🔲 DT2217-TCE(TPP) 🔲 Not Required
DT1660-COR		
Received 🔍 Y 🖲 N		
Recorded O Y ON		
UA # or UTL # not cleared	comments.	
		▼ 999 characters left
Agreement Details:		▼ 999 characters left
Utility ID:	5026 - 01 - 40	Credits:
Agreement Estimate:	\$ 35,000.00	Used Life: \$ 1.00
FIIPS Estimate:	\$ 33,000,00	Salvage: \$ 22.00
Agreement Approval Date	•	Betterment: \$ 333.00
Cover Memo Sent Date:	12/04/2013	Plant loss: \$ 4,444.00
Agreement Types: 📖		
- ··· 🗹 DT	1541 Audit DT 1542 Lump Sum	DT1575 Municipal DT2192 No Land Interest
	2193 Audit-Prior Land Rights 🔲 DT2194 Lump Sum-Prior Land Ri	ignts 🔲 Other
	e agreement covers. Discuss any unusual circumstances sussion for UFODS training module.	5.
Example brief disc	ussion for groups training module.	
		- 949 characters left
		Una Characters lett
	Save Delete	

Figure 3.0 Utility Number and Agreement Information (UNAI) section

Business rules for UNAI section:

- Users should create a Utility ID in FIIPS for each compensable agreement.
- Multiple agreements can be created for one UFO in this section.
- To save a record in the Utility Number section, values are required in these 3 fields: 1. R/W ID, 2. either UTL # or UA #, 3. Plat Type
- To save a record in the Agreement Details section, a value is required in the Utility ID field.
- Either **UTL** # or **UA** # can have a value, but both cannot. User will not be allowed to save record if there is a value in both fields.
- If UTL # contains a value, only Comp Waived UTL # can be checked. Comp Waived UA # cannot be checked in this case.
- If UA # contains a value, only Comp Waived UA # can be checked. Comp Waived UTL # cannot be checked in this case.
- **DT1660-COR** checkbox must be checked to Edit/Export the DT1660 form in DOCR.
- A **Plat/Plan Date** is required to export the *Cover Memo for Agreements* from DOCR.
- **UA #** must be entered and **Agreement Type: DT1575 Municipal** must be checked before the DT1575 form can be exported from DOCR.

• An agreement must exist before **Invoice** or **Change Order** records can be created. Each **Invoice** and **Change Order** must link to one agreement record.

Utility Number Details

This sub-section is completed for any UFOs that are eligible for compensation, and/or choose to waive compensation. Multiple agreements can be entered. The fields to be completed are further described below. To save a record in the **Utility Number** section, values are required in these 3 fields: 1. **R/W ID**, 2. either **UTL # or UA #**, 3. **Plat Type**.

R/W ID

The right-of-way (R/W) ID is entered from the plat or plan for the highway improvement project. This is a required field.

UTL

A utility number (UTL #) is entered from the plat or plan for the highway improvement project. This number used to be known as the utility "parcel" number, but was renamed to "utility number."

• UTL # and UA # are mutually-exclusive, meaning only one of them can hold a value. If UTL # is entered, the UA # field is disabled. This is a required field.

UA

A utility agreement number (UA #) is entered from the plat or plan for the highway improvement project. This field is completed when working with municipal agreements.

• UA # and UTL # are mutually-exclusive, meaning only one of them can hold a value. If UA # is entered, the UTL # field is disabled. This is a required field.

Plat/Plan Date

Either a **plat date** or **plan date** is entered in this field. The value selected depends on which document the Utility Coordinator (UC) is using for reference during utility coordination. This date must be entered before the *Cover Memo for Agreements* can be exported from DOCR.

Comp Waived UTL

If a UFO waives compensation, this box is checked.

- **Comp Waived UTL #** and **Comp Waived UA #** are mutually-exclusive, meaning only one of them can be checked. If **Comp Waived UTL #** is checked, then **Comp Waived UA #** is disabled.
- If this field is checked, it affects the information displayed on the **DT1080**, *Utility Status Report* exported from DOCR, and the information displayed on the **Compensable Log** screen in TUMS. See Appendix B for detail.

Comp Waived UA

If a municipality waives compensation, this box is checked.

• **Comp Waived UA #** and **Comp Waived UTL #** are mutually-exclusive, meaning only one of them can be checked. If **Comp Waived UA #** is checked, then **Comp Waived UTL #** is disabled.

• If this field is checked, it affects the information displayed on the **DT1080**, *Utility Status Report* exported from DOCR, and the information displayed on the **Compensable Log** screen in TUMS. See Appendix B for detail.

Plat Type

Select one of three values from the dropdown menu: **Transportation Project Plat (TPP)**, **Traditional R/W Project Plat** or **Highway Construction Plan**. The value selected depends on which document the UC is using for reference during utility coordination. This is a required field.

Release of Right(s) Forms Used

Click to place a checkmark in front of each form used for this agreement. Multiple boxes can be checked. A checkmark indicates the form is used. No checkmark indicates the form is not used.

• Not Required checkbox indicates that a Release of Rights (ROR) form is not required for this agreement. If a checkmark is placed in this checkbox, a system message will appear. The message reminds user to complete the **Brief discussion** text box and describe why an ROR form is not required.

Received

Click to select either **Y** (yes) or **N** (no), indicating whether the form has been signed and received from the UFO.

Recorded

Click to select either **Y** (yes) or **N** (no), indicating whether the form has been recorded and returned from the register of deeds office.

• **N/A** (not applicable) indicates that the selected form does not need to be recorded at the register of deeds office.

UA # or UTL # not cleared comments

Enter a comment in this text box explaining why the UTL # or UA # has not been cleared.

- A maximum of 1000 characters can be entered in this text box.
- This comment will appear on the DT1080, *Utility Status Report*. Once the parcel has been cleared, users need to remove this comment if they do not want it to appear on the DT1080.

Agreement Details

This sub-section is completed for any UFOs that are eligible for compensation, and/or choose to waive compensation. Multiple agreements can be entered. Each field is further described below.

Utility ID

To save a record in the **Agreement Details** section, a value is required in this field. Utility Coordinators (UC) can set up utility IDs in FIIPS (a WisDOT financial application), and then enter the utility ID in this field. Once entered here, TUMS will auto-connect to FIIPS and check for the matching utility ID. If one is found, TUMS will auto-download the matching value for the **FIIPS Estimate** field also.

- A value must be entered in the utility ID field, in order to save a record in the **Agreement Details** section.
- If there is <u>not</u> a utility ID set up in FIIPS (comp waived scenarios), the user can enter the **Plat ID** in this field as a substitution for a FIIPS utility ID.
- In rare cases related to UA #, users are allowed to enter a **Plan ID** (also known as construction plan ID) as a substitution for utility/plat IDs.
- When an ID is entered in this field (whether a Utility ID, Plat ID or Plan ID), and user clicks the **Save** button (to save the record), TUMS quickly links to FIIPS and checks for a matching utility ID.

If a match is <u>not</u> found, a system message appears: **Utility ID does not exist in FIIPS**. User can click **OK** to close the system message window. The ID can still be saved, but the message serves as a warning to users that the utility ID has not been established in FIIPS.

Users should think about what is happening, and set up a utility ID in FIIPS if one is needed. If not, users can ignore the message.

Agreement Estimate

Enter the agreement estimate amount.

• **DT1080**, *Utility Status Report*. The **Agreement Estimate** amount will appear in the **Estimated Cost** column on the DT1080 form. If left blank, then **\$0.00** will appear in this column. Otherwise, the amount entered by user will appear in the column (whether user enters 1.00 or some other amount).

Note: If **Comp Waived UA #** is checked, then **NA** will appear in the **Estimated Cost** column on the DT1080 form, regardless of the amount entered by user in **Agreement Estimate** field.

• Compensable Log (Trans 220 Log-Compensable Utilities Only) screen. The Agreement Estimate amount will appear in the Estimated Cost column on the Compensable Log screen. If Agreement Estimate is left blank, then .00 will appear in the Estimated Cost column on Compensable Log screen. Otherwise, the amount entered by user will appear in the column (whether user enters 1.00 or some other amount).

Note: Comp Waived checkboxes do not affect what appears on the **Compensable Log** screen for this field.

FIIPS Estimate

The amount in this field is display-only, and cannot be entered or changed by the user. Also, it is linked to the utility ID. The amount would auto-fill from FIIPS when a matching utility ID has been created in FIIPS, and entered in TUMS. See **Utility ID** (directly above) for more information.

Agreement Approval Date

The date in this field is display-only, and cannot be entered or changed by the user. Once the agreement has been sent to and approved by Central Office (CO) staff, an approval date will be entered into TUMS, and then it will display here.

Cover Memo Sent Date

The date in this field is display-only, and cannot be entered by the user. Once a *Cover Memo for Agreements* has been exported successfully from DOCR, or a **Cover Memo Sent Date** has been entered manually in Manage Tracking, then the date will display here.

Credits (Used Life, Salvage, Betterment, Plant loss)

Enter credits amounts allowed for Used Life, Salvage, Betterment and Plant loss.

Agreement Types

Click to place a checkmark next to correct agreement type. Typically, only one agreement type is selected.

Brief discussion of what the agreement covers. Discuss any unusual circumstances.

Enter a comment in this text box explaining any necessary detail related to this utility number or agreement.

- A maximum of 1000 characters can be entered in this text box.
- This comment will appear on the *Cover Memo for Agreements* above the **Credits** section.

How to Add and Save Agreements

To add agreements, follow these steps:

- 1. Agreements are added in the **Utility Number and Agreements Information (UNAI)** section of UFODS.
- 2. Three fields are mandatory in order to save a new agreement record: **R/W ID**, either **UTL # or UA #** (one, not both), and **Plat Type**.
- 3. An agreement must exist before **Invoice** or **Change Order** records can be created. Each **Invoice** and **Change Order** must link to one agreement record.
- 4. If this is the initial agreement being entered for a UFO (no agreements exist for this UFO yet), simply begin to fill-out the fields as described under **Utility Number Details** and **Agreement Details** subsections of this manual. Press the **Save** button when done.
- 5. If this is an additional agreement (other agreements already exist for this UFO), then click Add button, to add a new agreement record.

Utility Number and Agreement Information: Hide	Agreement 1 of 5 < <prev next="">>> Add</prev>
Utility Number Details:	
R/W ID: 5026 - 01 - 20 UTL #: 20 UA #: Plat/Plan Date:	02/01/2010 (mm/dd/yyyy) Comp Waived UTL #: Comp Waived UA #:

6. The "Agreement X of X" reference will increment and all fields will clear so a new record can be entered. Also **<<Prev** and **Next>>** navigation buttons appear to allow user to move between

agreements.

	Utility Number and Agreement Information: Hide	Agreement 6 of 6 << Prev Next>> Add				
	Utility Number Details:					
	R/W ID: - UTL #: UA #: Plat/Plan Date: (mm/dd/yyyy)	/) Comp Waived UTL #: 🔲 Comp Waived UA #: 🗐				
Plat Type: Select One Fields clear, Agreement X of X increments, and < <prev, next="">> navigation but</prev,>						
	Release of Rights Form(s) Used: DT1660-COR DT1661-QCD DT2216-TCE(Non-TPP) DT2217-TCE(TPP) Not Required					

- 7. Fill-out all fields in this section as described under **Utility Number Details** and **Agreement Details** sub-sections of this manual.
- 8. Click **Save** button to save changes, otherwise, they will be lost.

Brief discussion of what the agreement covers. Discuss any unusual circumstances.	
	*
	▼ 1000 characters left
Save Cancel	

9. Or, click **Cancel** button to cancel the process and return to previous screen. In this case, a new agreement is not added.

How to Delete Agreements

To delete agreements, follow these steps:

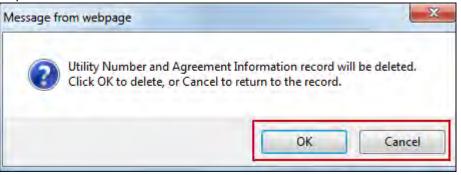
- 1. Agreements are deleted in the **Utility Number and Agreements Information (UNAI)** section of UFODS.
- 2. Use the <<**Prev** and **Next>>** navigation buttons to move between agreements, and select the agreement to be deleted.

I	Utility Number and Agreement Information: Hide	Agreement 1 of 5 << Prev Next>> Add
	Utility Number Details:	
	R/W ID: 5026 - 01 - 20 UTL #: 20 UA #: Plat/Plan Date: 02/01/2010 (mm/dd/yyyy)	Comp Waived UTL #: 🔲 Comp Waived UA #: 🗌

3. Click the **Delete** button at bottom of UNAI section to begin delete action.

Brief discussion of what the agreement covers. Discuss any unusual circumstances.			
Delete record - training manual	~		
	~	968	characters left
Save Delete			

4. A system message appears to confirm the deletion. Click **OK** button to continue, or **Cancel** button to stop the delete action.



5. If **OK** was selected, a "...deleted successfully" message appears in red text at top of UNAI section. Also the number of agreements is decreased by one.

Utility Number and Agreement Information record deleted successfully	
Utility Number and Agreement Information: Hide	Agreement 4 of 4 << <u>Prev</u> Next>> Add
Utility Number Details:	
R/W ID: 5026 - 01 - 33 UTL #: UA #: 333 Plat/Plan Date: 02/01/2011 (mm/dd/yyyy)	Comp Waived UTL #: 🗌 Comp Waived UA #: 🗐
Plat Type: Highway Construction Plan 🗸	

6. Alternatively, if **Cancel** was selected, the delete action stops. User can continue with editing as required.

Change Order Information

In this section, users can add, edit, delete or view details for change orders and second moves. Users can monitor receive/return/approval dates from Central Office staff on this screen.

Also, Central Office staff review the data here in order to approve change orders.

Change orders (and second moves) must link to <u>one</u> utility agreement. The utility agreements are located directly above **Change Order Information** on same screen in the **Utility Number and Agreement Information (UNAI)** section. To see change order information for a different agreement, users must scroll up to the UNAI section, and navigate to the correct agreement number. Users should pay close attention to the upper-right corner of the **Change Order Information** area, to ensure that they are linked to the correct agreement, as shown here:

Change O	order Information: 🖽	ide			> Agree	ment 2 of 4
Change (Order Details:					Add
Seq	Second Move	Amount	Received by CO	Returned by CO	Approved by CO	Details
1	Ν	\$ 12,000.00				Details

How to Add Change Orders

To add change orders, follow these steps:

1. Change orders are added in the Change Order Information section of UFODS.

2. Click Add button, to add a new change order record.

Change Order Information: Hide Agreement 2 of 4						ment 2 of 4
Change Or	der Details:					
Seq	Second Move	Amount	Received by CO	Returned by CO	Approved by CO	Details
1	N	\$ 12,000.00				Details

3. The Change Order Details screen opens.

Change Order Details				
Agreement:	Agreement2(5026-01-41) 👻			
Second Move:	© Y ◎ N			
Amount(\$):				
Save Cancel				

- 4. The currently-linked Agreement ID will default in **Agreement** box. If this is correct, leave as is; otherwise, select correct agreement from dropdown menu. The drop-down menu displays all available agreements for the utility company.
- 5. Click to select either the **Y** (yes) or **N** (no) radio button indicating whether this is a second move or not. Only one value can be selected.
- 6. Enter a value in the **Amount(\$)** box.
- 7. Click **Save** button to save changes.
- 8. Or alternatively, click **Cancel** button to cancel the process and return to previous screen. In this case, a new change order will not be added.

How to Edit or Delete Change Orders

To edit or delete change orders, follow these steps:

- 1. Change orders are edited and deleted in the Change Order Information section of UFODS.
- 2. Click <u>Details</u> link to edit or delete an existing change order record.

Change Order Information: Hide Agreement 2 of 4						
Change Order Details:						Add
Seq	Second Move	Amount	Received by CO	Returned by CO	Approved by CO	Details
1	N	\$ 12,000.00				

3. The Change Order Details screen opens.



- 4. The **Agreement** ID cannot be edited. If this needs to be changed, users must delete the change order and re-enter it.
- 5. Click to edit the **Y** (yes) or **N** (no) radio button indicating whether this is a second move or not. Only one value can be selected.
- 6. Edit the value in **Amount(\$)** box.
- 7. Click **Update** button to save changes.
 - a. Or, click **Delete** button to delete change order.
 - b. Or, click **Cancel** button to cancel the process and return to previous screen.

Invoice Information

In this section, users can add, edit, delete or view details for invoices. Users can monitor receive/return/approval dates from Central Office staff on this screen.

Also, Central Office staff review the data here in order to approve invoices.

Invoices must link to <u>one</u> utility agreement. The utility agreements are located above on same screen in the **Utility Number and Agreement Information (UNAI)** section. To see invoice information for a different agreement, users must scroll up to the UNAI section, and navigate to the correct agreement number. Users should pay close attention to the upper-right corner of the **Invoice Information** area, to ensure that they are linked to the correct agreement, as shown here:

Invoice Information: Hide Agreement 1 of 4				nt 1 of 4		
Invoice Details:						Add
Amount	Received by Region	Returned by CO	Approved by CO	Final Bill	Second Move	Details
\$ 35,000.00	03/01/2013			Ν		<u>Details</u>

How to Add Invoices

To add invoices, follow these steps:

1. Invoices are added in the **Invoice Information** section of UFODS.

2. Click Add button, to add a new invoice record.

Invoice Information	n: Hide				Agreemer	nt 1 of 4
Invoice Details:					-	-> [Add]
Amount \$ 35,000.00	Received by Region 03/01/2013	Returned by CO	Approved by CO	Final Bill N	Second Move	Details Details

3. The Invoice Details screen opens.

Invoice Details	
Agreement:	Agreement1(5026-01-40) 💌
Second Move:	© Y
Final:	
Amount(\$):	
Received by Region:	(mm/dd/yyyy)
Save Cancel	

- 4. The currently-linked Agreement ID will default in **Agreement** box. If this is correct, leave as is; otherwise, select correct agreement from dropdown menu. The drop-down menu displays all available agreements for the utility company.
- 5. Click to select either the **Y** (yes) or **N** (no) radio button indicating whether this invoice is for a second move or not. Only one value can be selected.
- 6. Click to check the **Final** checkbox if this is the final invoice. Checked indicates this is the final invoice, and unchecked indicates it is not.
- 7. Enter a value in the **Amount(\$)** box.
- 8. Enter a date in the **Received by Region** box. This date indicates when the invoice was received by the region (from the utility company). Date must be entered in mm/dd/yyyy format. This date is required to add a new invoice record.
- 9. Click **Save** button to save changes.
- 10. Or alternatively, click **Cancel** button to cancel the process and return to previous screen. In this case, a new invoice will not be added.

How to Edit or Delete Invoices

To edit or delete invoices, follow these steps:

1. Invoices are edited and deleted in the Invoice Information section of UFODS.

2. Click <u>Details</u> link to edit or delete an existing invoice record.

Invoice Information	on: Hide				Agreemer	nt 1 of 4
Invoice Details:						Add
Amount	Received by Region	Returned by CO	Approved by CO	Final Bill	Second Move	Details
\$ 35,000.00	03/01/2013			Ν		Details

3. The Invoice Details screen opens.

Invoice Details	
Agreement:	Agreement1(5026-01-40) 🔻
Second Move:	©Y ◎N
Final:	
Amount(\$):	35,000.00
Received by Region:	03/01/2013 (mm/dd/yyyy)
Update Dele	te Cancel

- 4. The currently-linked agreement ID will default in **Agreement** box. If this is correct, leave as is. Otherwise, select correct agreement from dropdown menu. If changed, the invoice is auto-linked to selected utility agreement. The drop-down menu displays all available agreements for the utility company.
- 5. Click to edit the **Y** (yes) or **N** (no) radio button indicating whether this invoice is for a second move or not. Only one value can be selected.
- 6. Click to edit the **Final** checkbox. Checked indicates this is the final invoice, and unchecked indicates it is not.
- 7. Edit the value in **Amount(\$)** box.
- 8. Edit the date in **Received by Region** box. Date must be entered in mm/dd/yyyy format. A date must be entered in this field.
- 9. Click **Update** button to save changes and return to UFODS. User receives an "updated successfully" message. Alternatively, user can select one of the following:
 - a. Click **Delete** button to delete invoice. A confirmation message appears with two options:
 - Click **OK** to continue with delete action. User is returned to UFODP and receives a "deleted successfully" message.
 - Or, click **Cancel** to stop the delete action and return to **Invoice Details** screen. In this case, the record remains.
 - b. Click **Cancel** button to stop the update action and return to UFODS. In this case, any updates are cancelled.

Invoice Information – Without Agreement

This section has the same features as **Invoice Information** section; however, the invoice is not tied to a utility agreement. At times there is a need to enter an invoice that is <u>not</u> tied to a specific utility agreement. See the WisDOT Guide to Utility Coordination (UC Guide) for reasons this might happen.

Also, Central Office staff review the data here in order to approve each "invoice without agreement."

In this section, users can add, edit, delete or view details for "invoices without agreement." Users can monitor receive/return/approval dates from Central Office staff on this screen.

- 1. Click Add button, to **add** a new "invoice without agreement" record.
- 2. Click <u>Details</u> link to edit or delete an existing "invoice without agreement" record.
- 3. These features work exactly the same as described in this manual under **How to Add Invoices** and **How to Edit or Delete Invoices**. See those sections in this manual for detailed step-by-step instructions

oice Informatie	on - Without Agreement:	Hide				
voice Details - V	Without Agreement:					Ad
nvoice Details - \ Amount	Without Agreement: Received by Region	Returned by CO	Approved by CO	Final Bill	Second Move	Ad Details

An "invoice without agreement" record can be edited and linked to a utility agreement at a later date if needed. To do so, follow these steps:

- 1. Click <u>Details</u> link to select and edit an existing record.
- 2. A secondary screen opens where users can select the desired agreement from a dropdown menu.
- Once selected the "invoice without agreement" moves from the Invoice Information Without Agreement section, up to the Invoice Information section on UFODS. It auto-links to selected agreement and is displayed there.

Appendices

Appendix A: Glossary of Acronyms

- ACQ = Acquired
- APP = Approval or Approved
- BITS = Bureau of Information Technology
- BTS = Bureau of Technical Services
- CO = Central Office
- COMP = Compensable or Compensation
- COR = Conveyance of Rights in Land
- CUC = Consultant Utility Coordinator
- DOCR = Document Creator (WisDOT application)
- DOT = Department of Transportation
- ESS = Effort Summary Screen
- ETL = Electronic Transfer Load
- FIIPS = Financial Integrated Improvement Programming System
- IWA = Invoice Without Agreement
- LUG = Local Unit of Government
- MSR = Milestone Summary Report
- NFPD = No Facilities Per DT1077 Form
- NLV = No Longer Valid
- NOP = Not on Project
- OGC = Office of General Counsel
- PMIC = Nightly Data Transfer from FIIPS
- PMP = Project Management Plan (WisDOT application)
- PUC = Primary Utility Coordinator
- R/W = Right of Way
- ROR = Release of Rights
- RR = Required Return date
- Trans 220 = Administrative Rule Trans 220, part of Wisconsin Statute 84.063
- TUMS = Transportation Utility Management System (WisDOT application)
- UA # = Utility Agreement Number
- UA NO = Utility Agreement Number

- UAADD = Utility Agreement Approval Desired Date
- UC = Utility Coordinator
- UCC = Utility Coordination Completed
- UFO = Utility Facility Owner
- UFOD = Utility Facility Owner Details
- UFODS = Utility Facility Owner Details Screen
- UNAI = Utility Number and Agreement Information
- UOC = Utility Oversight Contact
- USR = Utility Status Report
- UTL # = Utility Number (used to be: Utility Parcel)
- UTL NO = Utility Number (used to be: Utility Parcel)
- WAMS = Wisconsin Access Management System
- WisDOT = Wisconsin Department of Transportation
- WPUAA = Work Plan Utility Agreement Approval

Appendix B: Criteria for Dates Columns

Compensable Log Screen and DT1080, Utility Status Report (USR)

The criteria for values in the **Dates** columns on **Compensable Log** screen in TUMS, and **DT1080**, *USR* form in DOCR, is largely derived from data stored on the UFODS in TUMS. For this reason, a description of the criteria is included here for reference.

DT1080, Utility Status Report in DOCR

- A. Column one, **PROJECT PLAN SENT** date:
 - 1. Auto-fill **1078 Sent** date (if there is one) from Effort Summary Screen (ESS) in TUMS, else dash.
- B. Column two, **UTL OR UA TO CO** date:
 - 1. Auto-fill **Cover Memo Sent** date (if there is one) from Manage Tracking screen in TUMS, else dash.
- C. Column three, **CO APP OR LUG ACQ** date: This column's criteria are complex; there are three possible scenarios described below.
 - 1. If agreement is compensable, **Agreement Approval Date** on **UFO Detail Page** in TUMS would auto-fill into this date column on the USR. **Note**: Only need to check for an **Agreement Approval Date**. Check for **Comp=Yes** is <u>not</u> needed.
 - 2. If **Comp Waived UTL #** is checked on **UFO Detail Page** in TUMS, then the **Cover Memo Sent** date will auto-fill into this date column on the USR.
 - 3. If **Comp Waived UA #** is checked on UFO Detail Page in TUMS, then:
 - a. No date will appear in the UTL OR UA TO CO or the CO APP OR LUG ACQ columns; both will have a dash. Note: PROJECT PLAN SENT date column will still display a date (if there is one in 1078 Sent column on ESS), else a dash.
 - b. There will be values displayed for these columns: Company Name, Type, UA NO, R/W Project ID, Project Plan Sent and Work To Be Done; else dash (if no values in these columns).
 - c. Utility Project ID (if one exists) will not display on DT1080; display a dash in this column.
 - d. **NA** will be displayed in the **Estimated Cost** column; no dashes used in this column in this scenario.
 - e. Check for **Comp=Yes** is <u>not</u> needed.

Business Policy: If the **Local Unit of Government** (LUG) is handing local utilities' agreements and conveyances, then this date column is left blank and the utility coordinator can enter this date manually in the MS Word document exported from DOCR.

Compensable Log (2246 Screen) in TUMS

Note: Records only display on Compensable Log (2246 screen) if **Comp=Yes** is checked for a UFO on the **UFO Detail Page** in TUMS.

- A. Column one, **NOTICE OF COMPENSABLE PACKET SENT** date:
 1. To be determined and added in a future project.
- B. Column two, UTL NO OR UA NO TO CO date:
 - 1. Auto-fill **Cover Memo Sent** date (if there is one) from Manage Tracking screen in TUMS, else leave blank.
- C. Column three, **CO APP OR LUG ACQ** date: This column's criteria are complex; there are three possible scenarios described below.
 - 1. If agreement is compensable and neither **Comp Waived UTL #** nor **Comp Waived UA #** is checked, then **Agreement Approval Date** on **UFO Detail Page** in TUMS will auto-fill into this date column on the Compensable Log (2246 screen).

Note: Only need to check for an **Agreement Approval Date**. Check for **Comp=Yes** is <u>not</u> needed for this specific scenario; the check is handled in a different function for the **Compensable Log** specifically.

- If Comp Waived UTL # is checked on UFO Detail Page in TUMS, then the Cover Memo Sent date (if there is one) from Manage Tracking screen in TUMS will auto-fill into this date column on the Compensable Log (2246 screen).
- 3. If **Comp Waived UA #** is checked on **UFO Detail Page** in TUMS, no dates will be displayed in the **UTL OR UA TO CO** or the **CO APP OR LUG ACQ** columns on the Compensable Log (2246 screen).