**Records Mgmt. Technician Reference Guide**

**(The guide does not get submitted to the Master File for Project1)**

**The information listed below is a foundation of the standard documents that would be included in a Project /Parcel electronic Master File. The purpose for the guide is to create consistency with the electronic master files located in PROJECT1. If you have a question regarding what Index a document should be stored, contact the Acquisition Manager for RW Project/Parcel and District Design Supervisor/Lead for PE project files.**

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|[ ]  **Master RW Parcel Project Order of Documents – PAR0XXX.PDF** |
|  | 1. Completed 210,310, 399, or 799 Form |
|  | 2. Index Cover Page Titled - **ACQUISITION DEED(S) & EASEMENT(S) & ALL TYPES OF AGREEMENT(S)** * Right-of-Way Agreement (Form-200)
* Railroad Agreement (Form 711 & 716)
* Railroad Agreement Green Sheet (Form 706)
* Railroad Offer (Form 704)
* Acquisition Deeds and Documents – (Forms 520, 524, 525, 527, 529, 531, 535)
* Realty Transfer Certificate
* Written Offer – (Form 201)
* Waiver Compensation (Form 211)
* Irrigation Agreements (Form 273)
* Release Document (Form 262 & 263)
* Agreements (Forms 212, 216, 221, 228, 229, 275, 276, 284)
* Grant of Possession (Form 237)
* Letter of Consents including BIA (Form 325, 325A & 326)
* Government Forms – Applications - If applicable (Forms 302, 304)
* Government Forms – Letters to Gov. entities – if applicable (Forms 313, 316, 318, 319, 320, 323)
* DNRC – If applicable, invoice and an easement and/or Land Use License to execute
* USFS – if applicable, Letter of Consent & Easement Conditions
 |
|  | 3. Index Cover Page Titled - **VALUATION & SETTLEMENTS** * Review Appraisal (Form 409)
* Appraisal (Stamped Master Copy 455 or 452 Including Attachments)
* Appraisal Revisions – (Form 297 & 458)
* Waiver Valuation – (Form 470)
* Report of Administrative Determination (Form 299)
* Recommendation of Legal Settlement
 |
|  | 4. Index Cover Page Titled - **TITLE INFORMATION & MORTGAGE RELEASES*** Title Policy
* Title Commitments (Verify a copy is saved in the PE finalized title commitment folder- do not copy)
* Secretary of State Principal Report
* Affidavit of Trustee
* Statement of Acknowledgement (Form 254)
* Child Support/Alimony Affidavit (Form 253)
* Authorization to Sign Partial Reconveyance of Trust Indenture (Form 223)
* Partial Release of Mortgage (Form 222)
* Disclaimer of Interest in Tenant-Owned Improvements (Form 219)
* Affidavit of Trustee, Partnership or LLC Authority (Form 218)
* Railroad Cover Letter (715)
 |
|  | 5. Index Cover Page Titled – **RELOCATION (if applicable)*** Application for Relocation Assistance Payment (Form 350)
* Letter 90-day Notice to Vacate from Date of Letter (Form 352)
* Moving Expenses for Individual or Family (Form 353)
* Parcel Information (Form 360)
* Letter 30-Day Notice to Vacate (Form 365)
* Organization Moving Expense Business (Form 366)
* Direct Loss of Tangible Personal Property (Form 369)
* Letter of Eligibility to Owner Occupant of 90-days or More (Form 370)
* Letter of Eligibility to Tenant for Supplemental Rent Payments (Form 371)
* Expenses to Search for Replacement Site Business (Form 373)
* Letter of Eligibility to Tenant Occupant of 90-days or More (Form 374)
* Letter General Notice (Form 381)
* Business/Farm/Ranch/Non-Profit Eligibility Letter (Form 383)
* Supplemental Housing PMT Tenant-Occupant for not Less than 90-days (Form 384)
* Parcel Relocation History (Form 397)
* Memo-Transmittal of Relocation Documents for Review and Action (Form 399)
 |
|  | 6. Index Cover Page Titled **– CORRESPONDENCES*** History (Form 208)
* Emails & Letters
* Audit (Form 100 & 110)
* Tax Reimbursement Form (Form 203)
 |
|  | 7. Index Cover Page Titled **– CONDEMNATION (if applicable)*** Memo to Legal/Transmitting Preliminary Condemnation – (Form 84)
* Memo to Plans/Prepare Condemnation Package – (Form 85)
* Memo to District/Attorney’s Report of Possession – (Form 86)
* Attorney’s Report of Possession – (Form 87)
* Condemnation Order/Land or Sign – (Form 96)
* Condemnation Order/Land and/or Access Control – (Form 97)
* Memo to Plans/Recorded Documents from Condemnation – (Form 99)
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|  | 8. Index Cover Page Titled **– LEGAL (if applicable)*** Final offer Letter – (Form 76)
* Letter/Final Offer/Sign – (Form 77)
* Letter/Final Offer/Land – (Form 78)
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|[ ]  **Master RW Project Order of Documents – GEN\_FILE.PDF** |
|  | 1. Index Cover Page Titled – **PROJECT & EMAIL CORRESPONDENCES**
 |
|  | 1. Index Cover Page Titled – **PROJECT REPORTS**
	* + Sales Catalog
 |
|  | 1. Index Cover Page Titled – **CLERK & RECORDER DOCUMENTS**
 |
|  | 1. Index Cover Page Titled **- ALL PROJECT PAYMENT DOCUMENTS**
* All Project AP Code Sheets and Payment Records
* Support Payment documents
* Relocation Payment Summary (Form 363)
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|[ ]  **Master PE Project Order of Documents – PE\_File.pdf** |
|  | Merge all document in the below order from the Z\_Finalized\_Project\_Docs. |
|  | 1. Index Cover Page Titled **– Project Documents*** Checking Folder – Project checking (all documents in this folder).
 |
|  | 2. Index Cover Page Titled **– Design Documents*** Design Folder – County receipts (all documents in this folder).
 |
|  | 3. Index Cover Page Titled **– Project Email Correspondences*** Email Folder – Project emails and correspondences (all documents in this folder).
 |
|  | 4. Index Cover Page Titled **– Financial Documents** * Financials Record Folder
* Form 628 Obligation/Overrun Checklist – Word document
* Title Sheet – Original to the Funding Request
* Funding request Memo to Financial Contact – Word Document
* Federal Project Aid Agreement – PDF Document
	+ Form 628 Obligation Calculation Sheet – Word Form
	+ Form 602 – Program Memo PDF and Word- PDF Document only
 |
|  | 5. Index Cover Page Titled **– PCMS Documents*** Authorization Memo – (example file name 8707000ROATH001.pdf – *save all revisions*).
* Revision Memos (example file name 8707000ROREV001.pdf save all revisions REV002, REV003 -*save all revisions*).
* Final Route Description – (example file name 8707000R0RTD001.pdf).
* Project Plans - (example file name choose the most recent document for final plan set **(by date)** 8707000ROPLN001**.**pdf. **Do not save all revisions).** This document is not saved in the Master file, this document is named PLANS.PDF.
* PE Studies – Including all Access, Irrigation, Cost, Stock pass Studies (example file name PEO001 & PEO002 -*save all revisions and supplementals*).
* Cadastral and Retracement Survey - Signed and Recorded document (example of file name SUCAD001.pdf – save all revisions, every District different file name).
 |
|  | 1. Index Cover Page Titled **– Title Commitments**
* From the Finalized Title Commitment folder – Finalized Title Commitment.
 |
|  | 1. Completed Project Closing 504 Form
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|  | The working electronic project file is moved to Closed **- \\state\mdt\prd\Helena\ROW\Projects** |

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|[ ]  **Create PLANS.PDF File** |
|  | The plans PDF file is created and saved to Project1 |

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|[ ]  **Create INDEX.PDF File** |
|  | The index of all Deeds recorded and returned saved to Project1. |