**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) |
|  | 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 |
|  | 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. |