# Contents

Quick Guides ................................................................................................................................................. 6
DM-5 Forms and URMS Equivalents .............................................................................................................. 6
Project Workflow Guide ................................................................................................................................. 8
User Setup and Login .................................................................................................................................. 14
Supported Browsers .................................................................................................................................... 14
URMS Login ............................................................................................................................................. 14
Registering to Use URMS ............................................................................................................................ 14
  Commonwealth Staff ..................................................................................................................................... 14
  Existing Business Partners with b- Login ................................................................................................. 15
  Utility Company or Consultant Not Yet a Business Partner ................................................................. 15
Reset Password ....................................................................................................................................... 16
User Roles ............................................................................................................................................... 17
Main Page Menus and Features ................................................................................................................. 18
Training Resources .................................................................................................................................... 18
Menu Bar ................................................................................................................................................ 18
  Dashboard ........................................................................................................................................... 18
Create Project ..................................................................................................................................... 18
Admin .................................................................................................................................................. 19
Project Health .......................................................................................................................................... 19
My Utility ........................................................................................................................................ 19
OCC & CO Lists ........................................................................................................................................ 19
Searching (Quick and Advanced) ............................................................................................................ 19
My Upcoming Tasks ................................................................................................................................ 20
My Active Projects .................................................................................................................................. 21
Sorting and Filtering ................................................................................................................................ 21
Exporting ................................................................................................................................................. 22
General URMS Features .............................................................................................................................. 23
Notifications, Tasks, and Deadlines ................................................................................................................ 23
Project Status ........................................................................................................................................ 24
  Progression from One Status to the Next .............................................................................................. 24
  Placing a Project on Hold ......................................................................................................................... 25
Project History ........................................................................................................................................ 26
Project Milestones.................................................................................................................................. 26
Project Health .......................................................................................................................................... 27
  PennDOT Project Health View............................................................................................................ 28
  Utility Project Health View .................................................................................................................. 30
Project Documents.................................................................................................................................. 32
Project Checklist...................................................................................................................................... 33
Integration with One Map ....................................................................................................................... 34
Project Team ........................................................................................................................................... 35
  PennDOT Project Team ....................................................................................................................... 36
  Utility Project Team ............................................................................................................................ 37
Local Projects .......................................................................................................................................... 37
Document Versioning ............................................................................................................................. 37
PennDOT Staff Enter Information on Behalf of a Utility ......................................................................... 38
Template Library ..................................................................................................................................... 38
Utilities Setup and Updating ....................................................................................................................... 39
  Creating a Utility ..................................................................................................................................... 39
  Creating Service Areas ............................................................................................................................ 40
  Creating Contacts .................................................................................................................................... 41
  Editing Utility Company Information ...................................................................................................... 42
  Deleting Utilities ...................................................................................................................................... 42
  Consultant Agreements .......................................................................................................................... 42
    Submit a Consultant Agreement......................................................................................................... 43
    Review the Consultant Agreement ..................................................................................................... 44
Create a Project in URMS ............................................................................................................................ 45
  MPMS Projects ........................................................................................................................................ 45
  Department Force Projects ..................................................................................................................... 46
  Project Priority ........................................................................................................................................ 47
  Design Build ........................................................................................................................................... 49
    Design Build Emergency Project ......................................................................................................... 50
  Fast Path.................................................................................................................................................. 50
  Set PennDOT Project Team ..................................................................................................................... 51
    Local Sponsor ...................................................................................................................................... 53
Project Status 1 - Project Scoping ............................................................................................................... 54
Preliminary Plans ................................................................. 54
  Upload Preliminary Plans .................................................. 54
  Review Preliminary Plans .................................................. 55
Perform Subsurface Utility Engineering (SUE) Evaluation .......... 56
Enter Scoping Information on the Project Information Screen .......... 57
  Preliminary Evaluation ...................................................... 58
  Pennsylvania One Call ...................................................... 58
  Segment Equalities .......................................................... 58
  Scoping Field View .......................................................... 59
Enter Scoping Costs .............................................................. 59
Enter Milestone Dates ........................................................... 59
Assign Utilities and Contacts .................................................. 60
Send Confirm Involvement Notification ..................................... 62
Project Status 2 - Verification ................................................ 64
  Review Preliminary Plans and Confirm Involvement ............... 64
  Upload Marked-up Plans .................................................... 66
  Set Utility Project Team ...................................................... 67
Incorporated Work ............................................................... 67
Request Authorization for Preliminary Engineering .................... 70
Request Authorization to Use Consultant Engineer ..................... 70
Test Hole Request and Approval ............................................ 70
Close Out Verification Status .................................................. 73
Project Status 3 - Conflict Identification ................................... 74
  Description of Utility Conflict Matrix (UCM) ......................... 74
Glossary of Conflict Fields ..................................................... 75
  Name/Description ............................................................ 76
  Location Information ......................................................... 76
  Facility Information .......................................................... 77
  RPI Information ............................................................... 77
  Conflict Analysis ............................................................. 78
  Defining Conflicts ............................................................ 79
  Owner vs Attacher, Owner vs Rider ....................................... 80
  Add Attacher or Rider Conflict ............................................ 80
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit the Utility Clearance</td>
<td>113</td>
</tr>
<tr>
<td>Review the Clearance</td>
<td>114</td>
</tr>
<tr>
<td>Updating the Clearance</td>
<td>115</td>
</tr>
<tr>
<td>Design Build Clearance</td>
<td>115</td>
</tr>
<tr>
<td>Generate Utility Clearance Certification</td>
<td>115</td>
</tr>
<tr>
<td>Utility Agreements</td>
<td>117</td>
</tr>
<tr>
<td>PennDOT Uploads Draft Agreement</td>
<td>117</td>
</tr>
<tr>
<td>Utility Returns Signed Agreement</td>
<td>117</td>
</tr>
<tr>
<td>Central Office Obtains Commonwealth Signatures</td>
<td>118</td>
</tr>
<tr>
<td>Project Status 6 - Pre-Construction</td>
<td>120</td>
</tr>
<tr>
<td>Prepare Notice to Proceed and Highway Occupancy Permit</td>
<td>120</td>
</tr>
<tr>
<td>Issue Notice to Proceed and Highway Occupancy Permit</td>
<td>121</td>
</tr>
<tr>
<td>Project Status 7 - Construction</td>
<td>122</td>
</tr>
<tr>
<td>Perform Relocations</td>
<td>122</td>
</tr>
<tr>
<td>Project Status 8 - Closeout</td>
<td>123</td>
</tr>
<tr>
<td>Administrative Tasks</td>
<td>124</td>
</tr>
<tr>
<td>Assigning PennDOT Users and Consultants to Districts</td>
<td>124</td>
</tr>
<tr>
<td>Manage Consulting Companies</td>
<td>125</td>
</tr>
<tr>
<td>Manage Resolutions and Activities</td>
<td>126</td>
</tr>
<tr>
<td>Manage Conditional Restrictions</td>
<td>128</td>
</tr>
<tr>
<td>Manage Template Signatures</td>
<td>129</td>
</tr>
<tr>
<td>Manage Parent - Subsidiary Relationships</td>
<td>130</td>
</tr>
<tr>
<td>Manage Cost Share Percentage</td>
<td>131</td>
</tr>
<tr>
<td>Appendix</td>
<td>132</td>
</tr>
<tr>
<td>URMS Tasks</td>
<td>132</td>
</tr>
</tbody>
</table>
# Quick Guides

## DM-5 Forms and URMS Equivalents

<table>
<thead>
<tr>
<th>Form Number</th>
<th>Form Description</th>
<th>Reference to URMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-300 to A-308</td>
<td>Cost Sharing Request Letters</td>
<td>Cost Share Process List Page Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Cost Share</td>
</tr>
<tr>
<td>A-400</td>
<td>Certification of Consultant Form</td>
<td>Consultant Agreements My Utility &gt; Consultant Agreements or Admin &gt; Consultant Agreements</td>
</tr>
<tr>
<td>A-415</td>
<td>Sample Consultant Agreement for One Specific Relocation</td>
<td>Consultant Agreements My Utility &gt; Consultant Agreements or Admin &gt; Consultant Agreements</td>
</tr>
<tr>
<td>A-503</td>
<td>Suggested letter format for requesting utility verification of type, size and location (T.S.&amp;L.) of existing facilities</td>
<td>Utility Involvement Manage Project &gt; Relocation Forms &amp; Requests &gt; Utility Involvement</td>
</tr>
<tr>
<td>A-505 D-4181-X</td>
<td>Preliminary Request for Bridge Occupancy</td>
<td>Utility Involvement Manage Project &gt; Relocation Forms &amp; Requests &gt; Utility Involvement</td>
</tr>
<tr>
<td>A-520</td>
<td>Suggested letter format for authorizing preliminary engineering for specific verification information and/or invitation to the Initial Design Meeting</td>
<td>Upload completed form A-520 to Project Documents</td>
</tr>
<tr>
<td>A-522</td>
<td>Suggested letter format for authorizing engineering for specific verification information and/or invitation to the Initial Design Meeting</td>
<td>Upload completed form A-522 to Project Documents</td>
</tr>
<tr>
<td>A-715 D-4181-P</td>
<td>Utility Relocation - Highway Occupancy Permit</td>
<td>Utility Relocation - Highway Occupancy Permit Manage Project &gt; Project Documents or Manage Project &gt; Workflow Notifications</td>
</tr>
<tr>
<td>Form Number</td>
<td>Form Description</td>
<td>Reference to URMS</td>
</tr>
<tr>
<td>-------------</td>
<td>------------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| A-716       | Sample Letter for Revised Utility Relocation Highway Occupancy Permit | Revised Utility Relocation Highway Occupancy Permit  
Manage Project > Project Documents  
or  Manage Project > Workflow Notifications |
| A-720       | Test Hole Permit | Test Hole Requests  
Manage Project > Relocation Forms and Requests > Test Holes |
| A-721       | Letter of Authorization for transmitting Test Hole permit to utilities | Test Hole Requests  
Manage Project > Relocation Forms and Requests > Test Holes |
| A-800       | Utility Relocation Questionnaire and Permit Application | Utility Involvement  
Manage Project > Relocation Forms and Requests > Utility Involvement |
| D-4181      | Preliminary Estimate for Utility Relocation | Preliminary Estimate  
Manage Project > RPI, Agreements & Invoicing > Preliminary Estimate |
| A-805       | Summary of Billing for Utility Relocation | Billing will be part of a future release of URMS. |
| D-4181-A    | Certification of Utility Completion Inspection | Inspection will be part of a future release of URMS. |
| D-4181-B    | Utility Relocation Clearance Report | Utility Work Summary  
Manage Project > Utility Clearance > Utility Clearance  
or  Manage Project > Project Documents |
| A-1100      | Utility Clearance for a State Project or a Sponsored Project | Utility Clearance  
Manage Project > Utility Clearance > Utility Clearance |
## Project Workflow Guide

The following table documents the workflow of URMS and the most relevant information about each of the steps of the process.

<table>
<thead>
<tr>
<th>Workflow Step</th>
<th>Who Does It - Primary</th>
<th>Who Does It - Secondary</th>
<th>Navigation</th>
<th>Additional Notes or Requirements</th>
<th>When Can the Step be Started</th>
<th>When Must the Step Be Completed</th>
<th>Associated Project Milestone</th>
<th>Associated Project Checklist Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Scoping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Project</td>
<td>PM</td>
<td>Any District Utility Unit User</td>
<td>Main Menu &gt; Create Project &gt; Utility Relocation Project</td>
<td>Must be in MPMS</td>
<td>When project is on the TIP and has a Let Date</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Set PennDOT Project Team</td>
<td>PM</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Project Team &gt; My PennDOT Team</td>
<td>If not completed prior to later steps, system tasks may not generate correctly.</td>
<td>After project creation</td>
<td>Prior to completing scoping.</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Upload Preliminary Plans</td>
<td>Project Designer</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Project Plans &gt; Upload Preliminary Plans</td>
<td></td>
<td>After project creation</td>
<td>Prior to sending Confirm Involvement Notification</td>
<td>Preliminary Plans Uploaded</td>
<td>--</td>
</tr>
<tr>
<td>Perform SUE Impact Evaluation</td>
<td>Project Designer</td>
<td>Any District Utility Unit User</td>
<td>Task or Project Information Page &gt; View SUE Impact Evaluation</td>
<td></td>
<td>After project creation</td>
<td>Prior to Utility Clearance, but should be done by Conflict Identification</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Review Preliminary Plans</td>
<td>Scoping Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Project Plans &gt; Review Preliminary Plans</td>
<td></td>
<td>After plans uploaded</td>
<td>Prior to sending Confirm Involvement Notification</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Complete Project Scoping</td>
<td>Scoping Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Task or Project Information Page &gt; Edit button</td>
<td>Checkbox - All scoping field view activities complete</td>
<td>After project creation</td>
<td>Prior to sending Confirm Involvement Notification</td>
<td>Project Scoping Complete</td>
<td>--</td>
</tr>
<tr>
<td>Review SUE Evaluation</td>
<td>Utility Unit Oversight</td>
<td>Any District Utility Unit User</td>
<td>Task or Project Information Page &gt; View SUE Impact Evaluation</td>
<td></td>
<td>After SUE evaluation completed</td>
<td>Prior to Utility Clearance, but should be done by Conflict Identification</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Create Milestone Dates</td>
<td>Scoping Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Project Information Page &gt; Utility Milestones Tab</td>
<td></td>
<td>After project creation</td>
<td>Prior to completing scoping. Early completion is best.</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Add Utilities and Contacts</td>
<td>Scoping Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Project Team &gt; Assign Utilities to Project</td>
<td></td>
<td>After project creation</td>
<td>Prior to adding conflicts</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Send Confirm Involvement Notifications</td>
<td>Scoping Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Workflow Notification</td>
<td>This transitions project to Verification Status</td>
<td>After utility is added to project and plans are uploaded and approved</td>
<td>Prior to transitioning to Verification Status</td>
<td>Utilities Notified</td>
<td>--</td>
</tr>
<tr>
<td>Project Status</td>
<td>Workflow Step</td>
<td>Who Does It - Primary</td>
<td>Who Does It - Secondary</td>
<td>Navigation</td>
<td>Additional Notes or Requirements</td>
<td>When Can the Step be Started</td>
<td>When Must the Step Be Completed</td>
<td>Associated Project Milestone</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------</td>
<td>----------------------</td>
<td>-----------------------</td>
<td>-----------</td>
<td>-------------------------------</td>
<td>-----------------------------</td>
<td>-----------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>2. Verification</td>
<td>Complete Utility Involvement</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Utility Involvement</td>
<td>Must either upload plans or check no plans box</td>
<td>After receiving notification</td>
<td>30 days after notification.</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Set Utility Project Team</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Manage Project &gt; Project Team &gt; My Utility Team</td>
<td>--</td>
<td>After completing involvement</td>
<td>Prior to Utility Clearance</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Incorporated Work</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Incorporated Work</td>
<td>--</td>
<td>After receiving Confirm Involvement notification</td>
<td>Prior to Utility Clearance</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Upload Incorporated Work Request</td>
<td>Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Incorporated Work</td>
<td>--</td>
<td>After receiving request</td>
<td>Prior to Utility Clearance</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Review Incorporated Work Request – District</td>
<td>Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Incorporated Work</td>
<td>--</td>
<td>After receiving request</td>
<td>Prior to Utility Clearance</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Utility Consultants</td>
<td>Any Utility Company User</td>
<td>--</td>
<td>My Utility &gt; Consultant Agreements</td>
<td>--</td>
<td>After confirming involvement</td>
<td>Prior to consultant being able to work on project.</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Review Consultant Agreement</td>
<td>Any CO User</td>
<td>--</td>
<td>Task or Admin &gt; Consultant Agreements</td>
<td>--</td>
<td>After agreement upload</td>
<td>Prior to consultant being able to work on project.</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Test Holes</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Manage Project &gt; Relocation Forms &amp; Requests &gt; Test Holes</td>
<td>--</td>
<td>After confirming involvement</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Request Test Hole Permit</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Manage Project &gt; Relocation Forms &amp; Requests &gt; Test Holes</td>
<td>--</td>
<td>After confirming involvement</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Review Test Hole Permit</td>
<td>DURA</td>
<td>Any District Utility Unit User (not consultant)</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Test Holes</td>
<td>--</td>
<td>After test hole request submitted</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Upload Test Hole Results</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Manage Project &gt; Relocation Forms &amp; Requests &gt; Test Holes</td>
<td>--</td>
<td>After test hole permit issued</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Preliminary Engineering</td>
<td>Any Utility Company User</td>
<td>--</td>
<td>Offline request via email.</td>
<td>--</td>
<td>--</td>
<td>Prior to Phase 5 funding being opened</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Request Preliminary Engineering Authorization (optional)</td>
<td>DURA only</td>
<td>--</td>
<td>Create letter offline using Figure A-520 from DM-5 and upload to URMS.</td>
<td>--</td>
<td>After receiving request</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Close Out Involvement</td>
<td>Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Relocation Forms &amp; Requests &gt; Utility Involvement (All Utilities View)</td>
<td>Checkbox - Check this field if all the utilities have completed the Involvement.</td>
<td>30 days after sending notifications</td>
<td>Prior to moving to Conflict Identification status.</td>
<td>Verification Complete</td>
</tr>
</tbody>
</table>
## Project Status

<table>
<thead>
<tr>
<th>Workflow Step</th>
<th>Who Does It - Primary</th>
<th>Who Does It - Secondary</th>
<th>Navigation</th>
<th>Additional Notes or Requirements</th>
<th>When Can the Step be Started</th>
<th>When Must the Step Be Completed</th>
<th>Associated Project Milestone</th>
<th>Associated Project Checklist Item</th>
</tr>
</thead>
</table>

### 3. Conflict Identification

<table>
<thead>
<tr>
<th>Add Conflicts</th>
<th>PM and Conflict Coordinator</th>
<th>Any District Utility Unit User</th>
<th>Project Information Page &gt; Conflict Management Tab &gt; Add Conflict</th>
<th>Checkbox - Conflicts entered and ready for Utility Resolutions. Must complete Scoping Field View to enable checkbox.</th>
<th>After utilities and contacts have been added</th>
<th>Prior to issuing Engineering Authorization (although conflicts can be added later)</th>
<th>-</th>
<th>-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Final Design Plans</td>
<td>Project Designer</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Project Plans &gt; Upload Final Design Plans</td>
<td>-</td>
<td>After project creation</td>
<td>Prior to issuing Engineering Authorization</td>
<td>Final Design Plans Uploaded</td>
<td>-</td>
</tr>
<tr>
<td>Review Final Design Plans</td>
<td>Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Project Plans &gt; Review Final Design Plans</td>
<td>-</td>
<td>After Final Design Plans have been uploaded</td>
<td>Prior to issuing Engineering Authorization</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Send Resolve Conflicts Notification</td>
<td>Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Workflow Notification</td>
<td>Checkbox – All Conflicts Entered</td>
<td>After milestone dates entered, preliminary and final plans approved, and All Conflicts Entered checkbox</td>
<td>-</td>
<td>Final Designs Sent</td>
<td>Engineering Authorization Issued</td>
</tr>
</tbody>
</table>

### 4. Conflict Resolution

<table>
<thead>
<tr>
<th>Resolve Conflicts</th>
<th>Utility Design Coordinator</th>
<th>Any Utility Company User</th>
<th>Project Information Page &gt; Supporting Work Tab &gt; Add Supporting Work Item</th>
<th>-</th>
<th>After receiving Resolve Conflicts notification</th>
<th>Prior to Utility Clearance</th>
<th>-</th>
<th>-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resolve Conflicts and Supporting Work</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Task or Manage Project &gt; Resolve Conflicts &gt; Resolutions &amp; Work Units</td>
<td>-</td>
<td>After receiving Resolve Conflicts notification</td>
<td>Prior to Utility Clearance</td>
<td>Conflicts Resolved</td>
<td>Utility Relocation Plan Uploaded</td>
</tr>
<tr>
<td>Review Resolutions and Work Units</td>
<td>Conflict Coordinator</td>
<td>Project Designer or any District Utility Unit User</td>
<td>Task or Manage Project &gt; Resolve Conflicts &gt; Review Utility Resolutions</td>
<td>Review 3 tabs of info: Resolutions, Work Units, and Construction Details. Then Approve or Return for More Info.</td>
<td>After utility submits resolutions and work units</td>
<td>Prior to Utility Clearance</td>
<td>Conflict Resolutions Approved</td>
<td>Resolutions and Activities Approved</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Substitute Right-of-Way</th>
<th>Utility Design Coordinator</th>
<th>Any Utility Company User</th>
<th>Manage Project &gt; Relocation Forms &amp; Requests &gt; Substitute ROW</th>
<th>Must be for a conflict with Potential or Yes indicated for substitute ROW.</th>
<th>After a conflict that is eligible for substitute ROW has been entered</th>
<th>Prior to Utility Clearance</th>
<th>-</th>
<th>-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Substitute Right-of-Way Request - District</td>
<td>Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Substitute ROW</td>
<td>-</td>
<td>After utility submits substitute right-of-way request</td>
<td>Prior to Utility Clearance</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Review Substitute Right-of-Way Request - CO</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td>Task or Manage Project &gt; Relocation Forms &amp; Requests &gt; Substitute ROW</td>
<td>-</td>
<td>After substitute right-of-way request is approved by District</td>
<td>Prior to Utility Clearance</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
# Project Status

<table>
<thead>
<tr>
<th>Workflow Step</th>
<th>Who Does It - Primary</th>
<th>Who Does It - Secondary</th>
<th>Navigation</th>
<th>Additional Notes or Requirements</th>
<th>When Can the Step be Started</th>
<th>When Must the Step Be Completed</th>
<th>Associated Project Milestone</th>
<th>Associated Project Checklist Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost Share</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Build Cost Share Offer - District</td>
<td>Utility Unit Oversight</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Cost Share</td>
<td>- -</td>
<td>After a conflict that is eligible for cost share has been entered.</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review Cost Share Offer</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Cost Share</td>
<td>Select a Cost Share offer and create/download letter.</td>
<td>After Cost Share Offer is created.</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Upload Signed Cost Share Letter</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Cost Share</td>
<td>- -</td>
<td>After Cost Share letter is created</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review Cost Share Letter - CO</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Cost Share</td>
<td>- -</td>
<td>After Cost Share request is approved by District</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review Cost Share Letter - Section Chief</td>
<td>CO Section Chief</td>
<td>- -</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Cost Share</td>
<td>- -</td>
<td>After Cost Share letter is approved by CO</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>Cost Share Approved</td>
</tr>
<tr>
<td><strong>Real Property Interest</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload RPI Request</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td>Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Real Property Interest</td>
<td>- -</td>
<td>When an eligible conflict exists</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review RPI Request - District</td>
<td>DURA</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Real Property Interest</td>
<td>- -</td>
<td>After RPI request is uploaded</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review RPI Request - CO</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Real Property Interest</td>
<td>- -</td>
<td>After RPI request is approved by District</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review RPI Request - OCC</td>
<td>OCC Attorney</td>
<td>- -</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Real Property Interest</td>
<td>- -</td>
<td>After RPI request is approved by CO</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review RPI Determination - CO</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Real Property Interest</td>
<td>May have to enter data for Compensable LF and Private Status Eligibility.</td>
<td>After RPI determination by OCC</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review RPI Determination - District</td>
<td>DURA</td>
<td>Any District Utility Unit User</td>
<td>Task or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Real Property Interest</td>
<td>May have to enter the ROW Established Date.</td>
<td>After RPI determination is reviewed by CO</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>RPI Reviewed</td>
</tr>
</tbody>
</table>
### URMS User Guide

#### Project Status

<table>
<thead>
<tr>
<th>Workflow Step</th>
<th>Who Does It - Primary</th>
<th>Who Does It - Secondary</th>
<th>Navigation</th>
<th>Additional Notes or Requirements</th>
<th>When Can the Step be Started</th>
<th>When Must the Step Be Completed</th>
<th>Associated Project Milestone</th>
<th>Associated Project Checklist Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Estimate</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit Preliminary Estimate</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td><strong>Task</strong> or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Preliminary Estimate</td>
<td>- -</td>
<td>After conflicts are entered</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review Estimate - District</td>
<td>Utility Unit Oversight</td>
<td>Any District Utility Unit User</td>
<td><strong>Task</strong> or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Preliminary Estimate</td>
<td>Review 2 tabs of info: Preliminary Estimate and Contracts. Then checkbox and Approve.</td>
<td>After utility submits estimate</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
<tr>
<td>Review Estimate - CO</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td><strong>Task</strong> or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Preliminary Estimate</td>
<td>Cost Share or RPI approval required. Review 2 tabs of info: Preliminary Estimate and Contracts. Then checkbox and Approve.</td>
<td>After District reviews estimate</td>
<td>Prior to Utility Clearance</td>
<td>- -</td>
<td>- -</td>
</tr>
</tbody>
</table>

#### 5. Contract Development

<table>
<thead>
<tr>
<th>Task</th>
<th>Who Does It - Primary</th>
<th>Who Does It - Secondary</th>
<th>Navigation</th>
<th>Additional Notes or Requirements</th>
<th>When Can the Step be Started</th>
<th>When Must the Step Be Completed</th>
<th>Associated Project Milestone</th>
<th>Associated Project Checklist Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Draft Agreement</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td><strong>Task</strong> or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Utility Agreements</td>
<td>- -</td>
<td>After estimate is approved by CO</td>
<td>Prior to Utility Clearance</td>
<td>Draft Agreements to Utilities</td>
<td>- -</td>
</tr>
<tr>
<td>Upload Signed Agreement</td>
<td>Utility Design Coordinator</td>
<td>Any Utility Company User</td>
<td><strong>Task</strong> or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Utility Agreements</td>
<td>- -</td>
<td>After receiving draft agreement</td>
<td>Prior to Utility Clearance</td>
<td>Agreements Signed</td>
<td>- -</td>
</tr>
<tr>
<td>Upload Fully Executed Agreement</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td><strong>Task</strong> or Manage Project &gt; RPI, Agreements &amp; Invoicing &gt; Utility Agreements</td>
<td>- -</td>
<td>After receiving signed agreement from utility</td>
<td>Prior to Utility Clearance</td>
<td>Reimbursement Agreement Executed</td>
<td>- -</td>
</tr>
<tr>
<td>Generate Clearance</td>
<td>District Conflict Coordinator</td>
<td>Any District Utility Unit User</td>
<td><strong>Task</strong> or Manage Project &gt; Utility Clearance &gt; Utility Clearance</td>
<td>SUE Evaluation must have been approved.</td>
<td>After all conflicts are resolved and approved</td>
<td>Prior to project let</td>
<td>D419 Complete</td>
<td>Utility Work Summary</td>
</tr>
<tr>
<td>Review Utility Clearance</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td><strong>Task</strong> or Manage Project &gt; Utility Clearance &gt; Utility Clearance</td>
<td>- -</td>
<td>After clearance has been generated</td>
<td>Prior to project let</td>
<td>D419 Complete</td>
<td>Utility Work Summary</td>
</tr>
<tr>
<td>Generate Utility Clearance Certification</td>
<td>CO Agreement Coordinator</td>
<td>Any CO User (except CO Admin)</td>
<td><strong>Task</strong> or Manage Project &gt; Utility Clearance &gt; Utility Clearance Certification</td>
<td>- -</td>
<td>After clearance has been approved for all involved utilities</td>
<td>Prior to project let</td>
<td>- -</td>
<td>- -</td>
</tr>
</tbody>
</table>
## Project Status

<table>
<thead>
<tr>
<th>Workflow Step</th>
<th>Who Does It - Primary</th>
<th>Who Does It - Secondary</th>
<th>Navigation</th>
<th>Additional Notes or Requirements</th>
<th>When Can the Step be Started</th>
<th>When Must the Step Be Completed</th>
<th>Associated Project Milestone</th>
<th>Associated Project Checklist Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Pre-Construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Notice to Proceed and/or Highway Occupancy Permit</td>
<td>DURA</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Relocation Forms &amp; Requests &gt; HOP/NTPs</td>
<td>--</td>
<td>After all conflicts are resolved and approved</td>
<td>Prior to relocation work</td>
<td>--</td>
<td>Notice to Proceed Issued</td>
</tr>
<tr>
<td>Issue Notice to Proceed and/or Highway Occupancy Permit</td>
<td>DURA</td>
<td>Any District Utility Unit User</td>
<td>Manage Project &gt; Workflow Notifications</td>
<td>--</td>
<td>After all conflicts are resolved and approved</td>
<td>Prior to relocation work</td>
<td>--</td>
<td>UR HOP Issued</td>
</tr>
<tr>
<td>7. Construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform Relocations</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>8. Post-Construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit Billing Package</td>
<td>Utility Construction Coordinator</td>
<td>Release 2 Feature</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Review Billing Package</td>
<td>Closeout Coordinator</td>
<td>Release 2 Feature</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>
User Setup and Login

Supported Browsers

URMS works best when using the most recent versions of the following browsers:

- Google Chrome
- Microsoft Edge
- Microsoft Internet Explorer

The Mozilla Firefox browser may work with URMS, but the system has not been tested and verified to operate properly on this browser.

URMS Login

The Login page is the first screen a user sees on the URMS site (urms.penndot.gov). Registered PennDOT staff use CWOPA credentials to enter the system, while business partners use the credentials received through the registration process. PennDOT users must also complete the registration process to be able to access URMS.

To get access to URMS, click the link to Register for an Account at the bottom of the login window and follow the instructions for setting up a new user in this user guide.

Registering to Use URMS

Users who do not yet have access to URMS begin the process of requesting access by clicking the Register for an Account button on the main URMS page. That takes you to a screen that lets you select your user type.

PennDOT staff and consultants with a c- CWOPA login can select "Commonwealth Staff." Utilities and Consultants must select "Business Partner."

Commonwealth Staff

PennDOT staff and consultants with a c- CWOPA login can select "Commonwealth Staff." Users must enter their CWOPA credentials on the resulting login page. This opens the PennDOT Request CWOPA
Application Access for URMS screen. Verify the contact information, then select the appropriate URMS role from the dropdown and type a justification. Finally, click the **Submit** button at the bottom right of the page to finish.

**Existing Business Partners with b- Login**

Utilities and Consultants must select "Business Partner" on the What Type of User are You screen. On the next screen, existing Business Partners can select the button that says **Request Access**. This opens an additional login page on which the "b-" business partner credentials should be entered.

Otherwise, walk through the section below to register as a new business partner.

**Utility Company or Consultant Not Yet a Business Partner**

A utility company or consultant that is not yet a business partner must complete the business partner registration process.

![Business Partner Registration: Organization Identification](image)

Begin by entering the Organization Name, FEIN, Organization City, and Organization Zip Code. After clicking the **NEXT** button, look for a link that appears at the bottom between the information input boxes and the Next button. If a recognized FEIN number was entered, it will say to "link the Organization to URMS."

If the FEIN is not recognized in the system, a red alert appears at the top of the page, and the link at the bottom reads, "Click here to register Business Partner Organization."
Select the link to open the page on which the organization's information can be entered. Complete all the required fields for the Organization Details, the Legal Address if needed, Contact Information, and a brief explanation for why the organization needs URMS access.

Click **NEXT** again, and the Register Enterprise Organization page follows. From the dropdown, select whether the organization is a consulting/construction company or a utility company.

The final step is the Data Release Agreement, which requires the user to check the box acknowledging affirmation of the agreement and to type their full name in the input box as an e-signature. The "Data Release Agreement" text at the end of the checkbox line is a link that opens the directive for the user's review in a new tab of the web browser.

**FINISH** completes the request to register a new business partner organization in URMS, which is sent to PennDOT for evaluation and approval. Look for a box in the middle of the screen confirming the task was completed successfully.

**Reset Password**

If you already have a registered account but have forgotten your password, use the **Forgot Password** link below the **LOGIN** button on the Login screen. This opens a new page on the PennDOT Identify Services Portal that requires the username for URMS (User ID) and email address, through which further instructions will be emailed for resetting your password.

If you forget your username, use the **Forgot Username** link. The following page requires the first name, last name, and email address of the user, through which the URMS user ID information will be sent by email.
User Roles

Each user within the URMS system has a user role, which is assigned when they are first registered as a new user. The user role defines which pages a user can see, what actions they can take on pages, and what types of system tasks can be assigned to them. The user role is constant for each user and does not change based on what projects they are working on. This contrasts with the Project Team Role, which can be different for each project.

The User Roles within URMS are as follows:

<table>
<thead>
<tr>
<th>PennDOT Roles</th>
<th>PennDOT Consultant Roles</th>
<th>Utility Company and Utility Consultant Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Project Manager</td>
<td>PennDOT Consultant (Project Consultant)</td>
<td>Utility Administrator</td>
</tr>
<tr>
<td>District DURA (District Utility Relocation Administrator)</td>
<td>Central Office Consultant</td>
<td>Utility Design &amp; Construction</td>
</tr>
<tr>
<td>District Utility Unit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Office Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Office Admin (Administrative Assistant)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Main Page Menus and Features

This section describes the menus and features available from the main page of URMS.

Training Resources

The **TRAINING RESOURCES** button navigates to the **URMS Training Resources** page, where there are both written guides and recorded videos to provide instruction in using URMS. These training resources are organized by categorical groups. Click on the heading bar of one of these groups to drop down its list of resources that are linked.

Menu Bar

On any screen in URMS, the top of the window always has the light blue menu bar. The menu items are different for each user type and may include any of the following: Dashboard, Create Project, Admin, and Project Health, and My Utility.

The right side of the menu bar has the functions to **View All Tasks**, **View All Projects**, and search. The input box with the **GO** button is to find a specific project in the system using its MPMS number. The **SEARCH** button opens an advanced search screen that looks up projects based on more specific parameters. See the **Searching** section of this guide for detailed instructions.

Dashboard

Upon logging in to URMS, every user lands on the Dashboard screen. Pressing the **Dashboard** button at any time returns the user to this main dashboard page.

Create Project

The **Create Project** menu gives PennDOT users the options to add a new project to URMS, whether a Department Force Project or a standard Utility Relocation Project. See **Create a Project in URMS** for detailed instructions.
Admin

The Admin menu has navigation options for a variety of PennDOT administrative capabilities. This items in this menu will change based on your user type, but may include any of the following:

- Utility Companies
- Parent-Subsidiaries
- Consulting Companies
- Consultant Agreements
- Conditional Restrictions
- Assign Districts
- Template Signatures
- Resolutions & Activities
- Cost Share Percentages

Project Health

The Project Health menu holds the link to the District Project Health page.

My Utility

The My Utility menu holds links to:

- Utility Profile
- Parent-Subsidiaries
- Consultant Agreements
- Conditional Restrictions
- Utility Project Health

OCC & CO Lists

Central Office users also have the OCC & CO Lists menu heading. It provides the RPI Requests and Cost Share Offers links. RPI Requests opens a complete list of RPI requests for all active projects while Cost Share Offers shows all the cost share offers for active projects.

Searching (Quick and Advanced)

Find a project in URMS using the search box near the upper right corner of the screen. Begin the search by typing the project's MPMS number in this box. Select the GO button or hit the Enter key to run the search. If the given MPMS number does not belong to any existing project, an "Invalid MPMS#" notice will show below the search box. If the search is successful, URMS will navigate to the Project Information screen of the project.

For a more detailed search, click the SEARCH button to the right of the entry box, which will open the Advanced Search screen. Here a more specified search is run by selecting location information and entering details of the project or an involved utility. The text entry boxes for Road Name, Title, and Utility Name provide autocomplete options that appear once the user begins typing. In the Utility
section of the Advanced Search screen, the name of a valid utility must be entered first before the other Utility characteristics may be entered.

Click the **SEARCH** button at the bottom right corner of the screen to find a list of projects in URMS that meet the given criteria.

My Upcoming Tasks

First on the Dashboard page is the **My Upcoming Tasks** table. Here the user sees the current tasks assigned to them that need to be addressed. By default, the Upcoming Tasks are sorted by their **Due Date**; the task with the soonest due date is listed first, then the list descends chronologically toward the task with the latest due date at the end. The tasks can be re-sorted by clicking on a column heading. Clicking the **View All Tasks** button expands the tasks to the full page and gives greater control over the filtering and sorting of tasks.

Some tasks in the list may have icons beside the project number to identify important characteristics. A 🏡 icon is for a **Local project**. A yellow exclamation mark shows a **Critical project** while a red exclamation shows an **Emergency project**. The green 🧑‍💻 icon identifies a **Design-Build** project. Lastly, a file folder icon (📁) is for a Paper Project; these projects were started on paper prior to URMS’s launch, when they were then transferred into the system. Paper Projects are primarily for storing documents—they are not used for creating conflicts, tasks, or other typical workflow activities in URMS, but they can have new documents uploaded, team members assigned, and milestone dates entered.
See the Notifications, Tasks, and Deadlines section of this guide for more information about tasks. The Sorting and Filtering section gives more detail on filtering list rows in URMS based on selected criteria, including for the Upcoming Tasks.

My Active Projects

The next section down has the My Active Projects table, which lists all the in-progress projects in URMS for which the user has been assigned a role. By default, the active projects are sorted by MPMS# in ascending order. Just as with the Upcoming Tasks table, the sorting on this list of projects can be changed by clicking on a column heading, which changes the arrow next to the column heading to show the sort order.

Sorting and Filtering

Tables on the Dashboard page and throughout URMS can be sorted by clicking on a column heading that has sorting arrows. Column headings with text boxes underneath can be filtered by using the box. Filtering provides an easy method of searching for a specific record in a table or of limiting a list to view only a focused category of projects, activities, locations, dates, etc.

Most fields are filtered based on selectable options. Click the drop arrow within one of the white filter boxes to reveal the checklist of possible values. Multiple values for each column can be selected. As the filter options are chosen, the records in the table reduce to only those meeting the chosen criteria.

Other fields are filtered by an entry box in which the user types the value. The records begin filtering as the user types the numbers or words.

After a filter has been applied, reset the table to show all records using the Clear all Filters clickable text on the right side of the table header bar.
Exporting

Many tables and lists within URMS can be exported to an Excel file, which allows more flexibility in searching and sorting. The export button (e.g., "Export List," "Export Results") is at the right corner of any table that has exporting available. This button will generate and download an Excel workbook containing the data from all pages of the table. If a filter is set on the list, then only the records displayed will be exported; records that are filtered out will not be included in the Excel spreadsheet.

After clicking the button to export, look for the export file at the bottom of the browser window or in the computer's Downloads folder.
General URMS Features

General URMS features are described in the following sections.

Notifications, Tasks, and Deadlines

URMS includes multiple functions for communicating the current requirements of a project. Notifications alert a user of an action that was taken or needs to be taken. These are sent only by email.

Tasks, however, are the actions themselves that must be completed in the system. See URMS Tasks and Deadlines for a complete listing of all the tasks within URMS.

The Dashboard page of URMS displays a list of the Upcoming Tasks pertaining to the user, each of which may or may not include a notification. The Task field in this table gives the name of the next task to complete for that project.

The Due Date field shows the deadline by which to complete the task in URMS. These dates are driven either by the duration of the task or by the Milestone date to which the task is tied. See the Project Workflow Guide for more details on task dependencies. When the deadline for a task passes, the red bell icon appears beside the date to indicate it is overdue.

By default, the Upcoming Tasks are sorted by the Due Date column on the right, ascending from the soonest deadline to the latest. Click another column title to resort the records. Use the controls at the bottom right of the table to display more rows on the page or to move across the pages of records.

Select a row in this table to navigate to the screen that holds the current task. For example, clicking anywhere in the first row of the table in the screenshot below would bring the user to the Upload Preliminary Plans section of MPMS project 105462 in URMS.

Like other tables in the system, the upcoming tasks can also be filtered by any of the columns to find a specific task or set of tasks.

See URMS Tasks and Deadlines for a complete listing of all the tasks within URMS.
Project Status

The Project Status gives a general idea of the project's progress in the process, along with what steps may be required next. Find the status of a project in the top left of its project page or in its table row on the Dashboard.

The statuses listed chronologically are:

1. Scoping
2. Verification
3. Conflict Identification
4. Conflict Resolution
5. Contract Development
6. Pre-construction
7. Construction
8. Closeout

Progression from One Status to the Next

A project advances from one status to the next based on one or more defined factors. See Table 1 below for the specifications of each status and its progression. Also review the Project Workflow Guide for a general understanding of how one status progresses to the next.

Table 1 – Status Progression

<table>
<thead>
<tr>
<th>Design Phase</th>
<th>Status 1 Scoping</th>
<th>Status 2 Verification</th>
<th>Primary Activities</th>
<th>Progression Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Utility Scoping completed</td>
<td>Utilities identify involvement</td>
<td>Send notification to utilities</td>
<td>All utility involvement forms have been submitted AND all utilities within limits have uploaded marked-up plans</td>
</tr>
<tr>
<td></td>
<td>DURA receives/accept plans from Project Designer</td>
<td>Utilities provide marked-up verification plans</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Primary Activities

### Status 3
**Conflict Identification**
- Check if Phase 5 is open
- PM generates composite plans
- PM and Conflict Coordinator identify conflicts
- Final Design plans
- Generate engineering authorization
- Send plans to utilities
- Receive/Accept final design plan
- Consultant agreement submission/approval

### Status 4
**Conflict Resolution**
- Utilities can enter/provide resolutions
- Utilities submit RPI documents
- Utilities submit cost share documents
- Utilities submit incorporated work request
- Utilities submit estimate package
- Acquire substitute ROW

### Status 5
**Contract Development**
- CO drafts agreements
- CO/System drafts D-419
- Approved Unconditional D-419 (OR Special Provision)

### Status 6
**Pre-construction**
- Utilities approve incorporated work
- Amend D-419 and utility clearance
- Utilities start prior work (offline)
- Pre-bid construction conference
- All Utility NTP/permits issued

### Status 7
**Construction**
- Amend relocation plans and permits
- Physical Work Complete milestone (Actual)

### Status 8
**Closeout**
- Manual status change required

## Progression Rules

- Final Design Plans and UCM are sent to Utilities
- All conditionally accepted project plans must be accepted

### Placing a Project on Hold

URMS allows an active project to be placed On Hold by the District Utility Administrator. This changes the project’s status to On Hold and can be used to suspend work on the project.

The DUA can place a project On Hold using the button on the main project information page.

The DUA can remove the hold at any time using the same button. This will return the project to its previous status.
Project History

URMS records the history of actions taken in the system for a project. These details offer a timeline of the project’s progression as well as insight into which users fulfilled certain tasks and what data has been added.

To view a project’s history, go to the Project Page, click on the Manage Project button, and choose Project History from the dropdown menu.

The actions are organized by date by default. Click a column’s title to sort the records by that field instead. As with other tables in URMS, use the white input boxes below the column headings to type or select values by which to filter the project history.

![Project History](image)

Project Milestones

The milestone dates in the Project Milestones help to keep a project on track to meet the overall highway project’s schedule. URMS gives suggested dates for the milestones that are calculated based on a certain number of days subtracted from the let date in MPMS (see Table 2 below). Project milestones also drive some task deadlines.

The Enter Milestone Dates section provides a walkthrough of inputting the Project Schedule dates. The Actual Dates column populates as the milestone activities are completed in URMS throughout the utility relocation process.

- Milestones with a calendar icon to the left of the title in the Utility Milestone column have tasks that are driven by the milestone dates.

- A gray arrow button at the right end of each milestone row expands the milestone to show its required tasks in the system. Tasks that have already been completed are in gray and italics with a date in the Completed Date column, while remaining tasks are in white with no Completed Date.

Another indicator of incomplete tasks is in the milestone title itself, the text in parentheses after the name. As the column header states, the left number is the open, unfinished tasks, while the right
number are the closed tasks for that milestone. In the example below, "Draft Agreements to Utilities has one open task and four completed tasks ("1/4").

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Due Date</th>
<th>Assigned User</th>
<th>Utility - Utility Type</th>
<th>Completed Date</th>
<th>Days Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review RPI Determination (District)</td>
<td>06/17/2020</td>
<td>Jonathan Heilman</td>
<td>Somuch Electric Co.-Electric</td>
<td>06/10/2020</td>
<td>- 83</td>
</tr>
<tr>
<td>Review RPI request (CO)</td>
<td>06/17/2020</td>
<td>Jonathan Heilman</td>
<td>Somuch Electric Co.-Electric</td>
<td>06/10/2020</td>
<td>- 83</td>
</tr>
<tr>
<td>Review RPI request (District)</td>
<td>06/17/2020</td>
<td>Jonathan Heilman</td>
<td>Somuch Electric Co.-Electric</td>
<td>06/10/2020</td>
<td>- 83</td>
</tr>
<tr>
<td>Review RPI request (OCC)</td>
<td>06/17/2020</td>
<td>Jonathan Heilman</td>
<td>Somuch Electric Co.-Electric</td>
<td>06/10/2020</td>
<td>- 83</td>
</tr>
</tbody>
</table>

Table 2 - Calculations for Suggested Milestone Dates

<table>
<thead>
<tr>
<th>Primary Milestones</th>
<th>Not Complex</th>
<th>Moderately Complex</th>
<th>Most Complex</th>
<th>Most Complex with RR or Major Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Scoping Complete</td>
<td>Create Project + 30 days</td>
<td>Create Project + 30 days</td>
<td>Create Project + 30 days</td>
<td>Create Project + 30 days</td>
</tr>
<tr>
<td>Preliminary Plans Uploaded</td>
<td>Let Date - 238</td>
<td>Let Date - 301</td>
<td>Let Date - 434</td>
<td>Let Date - 518</td>
</tr>
<tr>
<td>ROW Plan</td>
<td>Let Date - 235</td>
<td>Let Date - 235</td>
<td>Let Date - 235</td>
<td>Let Date - 235</td>
</tr>
<tr>
<td>Utilities Notified</td>
<td>Let Date - 231</td>
<td>Let Date - 294</td>
<td>Let Date - 427</td>
<td>Let Date - 511</td>
</tr>
<tr>
<td>Verification Complete</td>
<td>Let Date - 203</td>
<td>Let Date - 266</td>
<td>Let Date - 399</td>
<td>Let Date - 483</td>
</tr>
<tr>
<td>Final Design Plans Uploaded</td>
<td>Let Date - 175</td>
<td>Let Date - 238</td>
<td>Let Date - 343</td>
<td>Let Date - 427</td>
</tr>
<tr>
<td>Final Design Plans Sent</td>
<td>Let Date - 168</td>
<td>Let Date - 231</td>
<td>Let Date - 336</td>
<td>Let Date - 420</td>
</tr>
<tr>
<td>Conflicts Resolved</td>
<td>Let Date - 98</td>
<td>Let Date - 119</td>
<td>Let Date - 168</td>
<td>Let Date - 168</td>
</tr>
<tr>
<td>Conflict Resolutions Approved</td>
<td>Let Date - 84</td>
<td>Let Date - 105</td>
<td>Let Date - 154</td>
<td>Let Date - 154</td>
</tr>
<tr>
<td>D419 Complete</td>
<td>Let Date - 70</td>
<td>Let Date - 91</td>
<td>Let Date - 140</td>
<td>Let Date - 140</td>
</tr>
<tr>
<td>Draft Agreements to Utilities</td>
<td>Let Date - 72</td>
<td>Let Date - 86</td>
<td>Let Date - 93</td>
<td>Let Date - 93</td>
</tr>
<tr>
<td>Agreements Signed</td>
<td>Let Date - 35</td>
<td>Let Date - 49</td>
<td>Let Date - 56</td>
<td>Let Date - 56</td>
</tr>
<tr>
<td>Let Date</td>
<td>Let Date</td>
<td>Let Date</td>
<td>Let Date</td>
<td>Let Date</td>
</tr>
</tbody>
</table>

Project Health

A project's health can be defined by how well the current requirements are being met in time for their due dates. This insight is available on the Project Health page in URMS, which is useful as a single location to see the progress status of active projects. The user can quickly find which requirements need
more immediate attention, what items may be missing, and the user role assigned to those projects. With the sorting and filtering functions, the table allows for organizing the projects by any of the health indicators. The Project Health page is available to both PennDOT users and utility users, but it provides different health indicators for each.

**PennDOT Project Health View**

Find the **Project Health** menu item on the light blue bar across the top of URMS and hover the mouse cursor over it to reveal the **District Project Health** option.

A District user will see the projects for their own specific District, while a Central Office user can choose which District to view with the dropdown selection box.

Each of the existing projects in URMS is listed with some of its characteristics as well as the status of its relocation activities. The projects can be sorted by the column headings and filtered by the white input box underneath most headings. Use the scroll bar at the bottom of the page to see more columns to the right.

Health indicator icons are displayed in many of the later columns of Final Plans, Lead Time Provided, Utility Clearance, Agreements Executed, and Budget vs. Funding. Table 3 below provides an explanation of each of the icons that may appear in the Project Health table.

A project’s health is further indicated by other fields in the table—whether the authorization has been issued and how many of the conflicts have been entered and resolved for each type of conflict.

Clicking on the MPMS number of a project navigates to its **Milestones** page, which gives further detail of the due dates of outstanding tasks.

<table>
<thead>
<tr>
<th>Project</th>
<th>TR</th>
<th>Seq</th>
<th>Status</th>
<th>PM</th>
<th>Conflict Coordinator</th>
<th>Complexity</th>
<th>HMsRtes</th>
<th>Lot Date</th>
<th>Eng Auth</th>
<th>Final Plans</th>
<th>Lead Time Provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>86481</td>
<td>1004</td>
<td>D01</td>
<td>Verification</td>
<td>Joshua Havenstick</td>
<td>Michael Hall</td>
<td>3</td>
<td>11/03/2016</td>
<td>Y</td>
<td>( )</td>
<td>( )</td>
<td></td>
</tr>
<tr>
<td>89406</td>
<td>06/19</td>
<td>D09</td>
<td>Verification</td>
<td>Joshua Havenstick</td>
<td>Michael Hall</td>
<td>2</td>
<td>02/15/2020</td>
<td>Y</td>
<td>( )</td>
<td>( )</td>
<td></td>
</tr>
<tr>
<td>507</td>
<td>0000</td>
<td>L00</td>
<td>Conflict Identification</td>
<td>Initial Identification</td>
<td>Initial Identification</td>
<td>Moderately Complex</td>
<td>4</td>
<td>06/26/2019</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>524</td>
<td>0000</td>
<td>L00</td>
<td>Conflict Identification</td>
<td>Joshua Havenstick</td>
<td>Michael Hall</td>
<td>Non-Complex</td>
<td>4</td>
<td>12/10/2019</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>1191044</td>
<td>0000</td>
<td>NML</td>
<td>Conflict Identification</td>
<td>Joshua Havenstick</td>
<td>Michael Hall</td>
<td>Moderately Complex</td>
<td>2</td>
<td>06/24/2021</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>192254</td>
<td>0018</td>
<td>D01</td>
<td>Conflict Identification</td>
<td>Joshua Havenstick</td>
<td>Michael Hall</td>
<td>Moderately Complex</td>
<td>2</td>
<td>06/24/2021</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
</tbody>
</table>
**Table 3 – District Project Health Indicators**

<table>
<thead>
<tr>
<th>Health Meter</th>
<th>Indicator</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final Plans Uploaded</td>
<td>Red</td>
<td>The Final Plans Uploaded task is overdue &gt; 7 days OR completed &gt; 7 days past its due date</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Final Plans Uploaded task is overdue =&lt; 7 days</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Final Plans Uploaded task is open and is =&lt; its due date OR completed within 6 days of its due date</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>The Project Status is Scoping or Verification.</td>
</tr>
<tr>
<td>Lead Time Provided</td>
<td>Red</td>
<td>[ Milestone schedule date for Conflicts Resolved - Actual Final Design Plans Sent ] / [ Suggested Schedule Conflicts Resolved - Suggested Schedule Final Design Plans Sent ] &gt; 0.21 (&gt;20%)</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>[ Milestone schedule date for Conflicts Resolved - Actual Final Design Plans Sent ] / [ Suggested Schedule Conflicts Resolved - Suggested Schedule Final Design Plans Sent ] &gt; 0.11 and &lt; 0.20 (11%-20%)</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>[ Milestone schedule date for Conflicts Resolved - Actual Final Design Plans Sent ] / [ Suggested Schedule Conflicts Resolved - Suggested Schedule Final Design Plans Sent ] &lt;= 0.10 (up to 10%)</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>The Project Status is Scoping, Verification, or Conflict Identification.</td>
</tr>
<tr>
<td>Utility Clearance</td>
<td>Red</td>
<td>The Complete Utility Clearance task is overdue.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Complete Utility Clearance task is less than or equal to 15 days from its due date OR the Utility Clearance has been submitted AND is conditional.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Complete Utility Clearance task is more than 15 days from its due date OR the Utility Clearance is non-conditional and has been approved.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>The Project Status is Scoping, Verification, or Conflict Identification.</td>
</tr>
<tr>
<td>Agreements Executed</td>
<td>Red</td>
<td>The Upload Signed Agreement task (both BP/non-BP) is overdue for 1 or more utilities.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Upload Signed Agreement task (both BP/non-BP) has 14 days or less remaining for 1 or more utilities.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>All Upload Signed Agreement tasks are completed OR all Upload Signed Agreement tasks (both BP/non-BP) have &gt; 14 days remaining.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>There are no Upload Signed Agreement tasks OR there are no documents of the type Utility Agreement.</td>
</tr>
<tr>
<td>Budget vs. Funding</td>
<td>Red</td>
<td>[Utility phase funding total] - [Total estimated nonincorporated costs to PennDOT] &lt; 0</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>[Utility phase funding total] - [Total estimated nonincorporated costs to PennDOT] &gt;= 0</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>The total estimated nonincorporated costs to PennDOT = 0</td>
</tr>
</tbody>
</table>
Utility Project Health View

Hover the mouse cursor over the My Utility menu item on the light blue bar across the top of URMS to find the Utility Project Health option in its dropdown.

Each of the utility’s existing projects in URMS is listed with some of its characteristics as well as the status of its relocation activities relevant to the utility. The projects can be sorted by the column headings and filtered by the white input box underneath most headings. Use the scroll bar at the bottom of the page to see more columns to the right.

Health indicator icons are displayed in many of the later columns, such as for Involvement, Private ROW, Cost Share, etc. Table 4 below provides an explanation of each of the icons that may appear in the Project Health table.

Clicking on the MPMS number of a project navigates to its Milestones page, which gives further detail of the due dates of outstanding tasks.
Table 4 – Utility Project Health Indicators

<table>
<thead>
<tr>
<th>Health Meter</th>
<th>Indicator</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Involvement</td>
<td>Red</td>
<td>The Utility's Confirm Involvement task is overdue.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Utility's Confirm Involvement task is less than or equal to 15 days from its due date.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Utility's Confirm Involvement task is more than 15 days from its due date OR all tasks are completed.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>The Project Status is Scoping</td>
</tr>
<tr>
<td>Resolve Conflicts</td>
<td>Red</td>
<td>The Utility's Resolve Conflicts OR Resolve Conflicts Accelerated task is overdue.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Utility's Confirm Resolve Conflicts OR Resolve Conflicts Accelerated is less than or equal to 15 days from its due date.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Utility's Resolve Conflicts OR Resolve Conflicts Accelerated task is more than 15 days from its due date.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>There is no Resolve Conflicts OR Resolve Conflicts Accelerated task for the Utility.</td>
</tr>
<tr>
<td>Incorporated Work Request</td>
<td>Red</td>
<td>The Utility's Upload Incorporated Work task is overdue.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Utility's Upload Incorporated Work task is less than or equal to 15 days from its due date.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Utility's Upload Incorporated Work task is more than 15 days from its due date OR all tasks are completed.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>There is no Upload Incorporated Work task for the Utility.</td>
</tr>
<tr>
<td>Private ROW</td>
<td>Red</td>
<td>The Utility has 1 or more resolutions with Private ROW = Required/Must Be Obtained and Resolve Conflicts due date is &lt; Today</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Utility has 1 or more resolutions with Private ROW = Required/Must Be Obtained and Resolve Conflicts due date is &gt; Today</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Utility has resolutions with Private ROW = Obtained OR Existing OR No</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>All Utility Resolutions have Private ROW = Existing OR No</td>
</tr>
<tr>
<td>Cost Share</td>
<td>Red</td>
<td>The Utility's Upload Signed Cost Share Offer task is overdue.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Utility's Upload Signed Cost Share Offer task is less than or equal to 15 days from its due date.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Utility's Upload Signed Cost Share Offer task is more than 15 days from its due date OR all tasks are completed.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>There is no Review Cost Share Offer task for the Utility.</td>
</tr>
<tr>
<td>Agreement</td>
<td>Red</td>
<td>The Utility's Upload Signed Agreement task is overdue.</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>The Utility's Upload Signed Agreement task is less than or equal to 15 days from its due date.</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>The Utility's Upload Signed Agreement task is more than 15 days from its due date OR all tasks are completed.</td>
</tr>
<tr>
<td></td>
<td>Gray</td>
<td>There is no Upload Signed Agreement task for the Utility.</td>
</tr>
</tbody>
</table>
Project Documents

Each project has a Project Documents screen that serves as the central storage for all documents associated with that project. These documents include files uploaded by the utilities, files uploaded by PennDOT on behalf of a utility, and files generated by URMS as part of the utility coordination process. Any documents completed on paper prior before uploading to URMS are also found in the Project Documents.

From the Project Information screen, click the Manage Project button and choose Project Documents from the dropdown options. The Project Documents screen shows all the files in the standard table list format. Click on a document's name to download and view it or click on the Delete text on the far-right side of the record to remove the document from the project.

Additionally, upload new files to the Project Documents by clicking Select Files to Upload or by dragging and dropping a file onto the section below the existing list. After the file is selected, it will appear at the bottom of the screen below the "Drop Files Here" section. Choose a document type from the given options and type any notes if desired. Then click the Upload Document button at the very bottom to complete the upload.
**Note**: The Project Documents screen is not be the primary place to upload documents. Uploading documents here may not properly trigger a task to review the document. Instead, documents should primarily be uploaded on the page that is specific to that document or process.

**Project Checklist**

The Project Checklist gives a snapshot of information that is most relevant for utilities. It shows the utilities that are actively involved in the project and those that are uninvolved. It also provides a link to approvals and documents generated during the workflow.

The checklist can be helpful for utilities to check on the status of their items, as well as for PennDOT Utility Units to look for incomplete processes prior to generating utility clearances. Furthermore, this page can serve as a central location for quick access to documents and pages used in the workflow.

Utilities added to the project show up under the heading of Uninvolved Utilities until the utility confirms that it is involved as part of the [Confirm Involvement process](#) and PennDOT adds one or more conflicts for that utility.

To find the checklist from a project screen, look to the top left corner where the project screen displays the project status, and below the status is the **View Checklist** link. Click this link to navigate to the **Project Checklist** view.

Grayed-out checklist items are not applicable to the project. Completed items have a green checkmark along with a link to a relevant document or screen in URMS. The rest of the items that are not grayed out are active but not yet completed.

The bottom of the Project Checklist view holds the documents that have been created for the project and may be useful for the utility. Click on a document's file name to download and view it.
Integration with One Map

One Map is a PennDOT web application that serves as a primary map-viewing tool for many combinations of PennDOT's publicly available geospatial feature layers. The application has a collection of additional layers available for viewing, a search box to locate a project based on one of its attributes, and various tools to analyze projects or assets in greater detail as well as export spatial data. One Map is publicly accessible at: https://gis.penndot.gov/onemap/

URMS has a button that quickly maps a project's features in One Map. From the Project Information screen, select the Location Information tab. The Location Information section has the heading for Relevant Bridges and Roadways, under which is a gray bar that holds the Show One Map button on the right side. Click this button to open a new browser tab containing the map view.

By default, the One Map view created through URMS displays a handful of layers that may be relevant to the utility relocation project, as shown in the screenshot. These include a point or line along the section of roadway defined for the construction project, titled "Selected MPMS Projects." Other visible layers are lines for active railways and navigable waterways and boundaries for municipalities and counties. Boundaries are also turned on for protected lands like state parks, state forests, game lands, and federal lands. Any layer can be hidden by unchecking the checkbox next to its name.

Click to select a feature on the map and open a "Layer Information" modal that lists all its fields. Where multiple layers overlap, the top-most layer in the Legend list will be selected. To change the selection to a layer below it, use the arrow buttons at the top of the modal window. Alternatively, move the desired layer to the top of the Legend by clicking and holding the four-line button to the left of the layer name and dragging it upward.

Clicking an open area on the map will select the boundary lines of the municipality that contains that area.
Detailed help for One Map is available on the One Map website at: https://gis.penndot.gov/onemap/static/webHelp/Welcome.htm

Project Team

For a project, PennDOT and each utility must set a project team, which determines who gets tasks generated within the application. The Project Workflow Guide shows the relationship between tasks and team role, and the tables below shows the various Project Team Roles as well as the User Roles that can be assigned to each team role.

For PennDOT, the PM or DURA selects in the application the user who will fill each PennDOT Project Team Role on the Project Team page. Similarly, a utility will determine which of its users will handle their role responsibilities. Only registered users within URMS can be placed in a project team role.

When the project is first created, the project team is automatically populated with the Utility’s Project Contact in all Utility team roles and the DURA in District team roles. People assigned to team roles can be changed at any time. When the person assigned to a team role is changed, the tasks will transfer to the new user filling the role. See the Set PennDOT Project Team or the Set Utility Project Team for a walkthrough of reassigning these team roles in URMS.

<table>
<thead>
<tr>
<th>PennDOT Project Team Roles</th>
<th>Utility Project Team Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Project Manager</td>
<td>• Utility Administrator</td>
</tr>
<tr>
<td>• Project Designer</td>
<td>• Utility Design Coordinator</td>
</tr>
<tr>
<td>• Utility Unit Oversight</td>
<td>• Utility Construction Coordinator</td>
</tr>
<tr>
<td>• Scoping Coordinator</td>
<td></td>
</tr>
<tr>
<td>• Verification Coordinator</td>
<td></td>
</tr>
<tr>
<td>• Conflict Coordinator</td>
<td></td>
</tr>
<tr>
<td>• District Agreement Coordinator</td>
<td></td>
</tr>
<tr>
<td>• Central Office Agreement Coordinator</td>
<td></td>
</tr>
<tr>
<td>• Preconstruction/Construction Coordinator</td>
<td></td>
</tr>
<tr>
<td>• Closeout Coordinator</td>
<td></td>
</tr>
</tbody>
</table>
**PennDOT Project Team**

The table below lists the PennDOT Project Team roles and the potential user roles that could be assigned to each.

<table>
<thead>
<tr>
<th>Project Team Role</th>
<th>Potential User Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>• Project Manager</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td>Project Designer</td>
<td>• Project Manager</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td>Utility Unit Oversight</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td></td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Admin</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
<tr>
<td>Scoping Coordinator</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td></td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
<tr>
<td>Verification Coordinator</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td></td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
<tr>
<td>Conflict Coordinator</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td></td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
<tr>
<td>District Agreement Coordinator</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td>Central Office Agreement Coordinator</td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
<tr>
<td>Preconstruction/ Construction Coordinator</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td></td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
<tr>
<td>Closeout Coordinator</td>
<td>• DURA</td>
</tr>
<tr>
<td></td>
<td>• District Utility Unit</td>
</tr>
<tr>
<td></td>
<td>• PennDOT Consultant</td>
</tr>
<tr>
<td></td>
<td>• Central Office</td>
</tr>
<tr>
<td></td>
<td>• Central Office Consultant</td>
</tr>
</tbody>
</table>
Utility Project Team

The table below lists the Utility Project Team roles and the potential user roles that could be assigned to each.

<table>
<thead>
<tr>
<th>Project Team Role</th>
<th>Potential User Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utility Administrator</td>
<td>• Utility Admin</td>
</tr>
<tr>
<td></td>
<td>• Utility Design &amp; Construction</td>
</tr>
<tr>
<td></td>
<td>• Utility Consultant</td>
</tr>
<tr>
<td>Utility Design Coordinator</td>
<td>• Utility Admin</td>
</tr>
<tr>
<td></td>
<td>• Utility Design &amp; Construction</td>
</tr>
<tr>
<td></td>
<td>• Utility Consultant</td>
</tr>
<tr>
<td>Utility Construction Coordinator</td>
<td>• Utility Admin</td>
</tr>
<tr>
<td></td>
<td>• Utility Design &amp; Construction</td>
</tr>
<tr>
<td></td>
<td>• Utility Consultant</td>
</tr>
</tbody>
</table>

Local Projects

Local projects are those that are designated with a 🏡 icon on the Dashboard page. These projects require that the name of the Local Sponsor be specified on the Project Team Page.

Document Versioning

When the same document is generated multiple times in URMS, the system records it having multiple versions. Displayed alongside the other details of the file in a file list, the "Version" number field tells how many times the document has been uploaded.

However, not all types of documents have this versioning. Any document created by URMS itself can be versioned, while other uploaded documents are versioned only on a case-by-case basis. See the table below for a list of document types that receive a version.

To update a document's version, look for the Update text at the far-right side of the table in which the document is listed. Click Update to open a modal window. In the Update Document window, drag and drop the new version of the file into the drop space, or use the button to select the file from the computer's folders. Once the document uploads, optionally add a note and then click the UPLOAD button to finish. The new version number will now be displaying in the table, along with the note and the new file name, if there is one.

The Update text button must be used for the new file to be considered the next version of the same document. Simply uploading another file with the same name will not version the document; it will be considered a different project document.
On any page that holds documents, the documents have a **Version** column. The version number in this column is clickable and opens a window that shows all the versions of the file.

**PennDOT Staff Enter Information on Behalf of a Utility**

Some utilities may not become business partners and gain access to this system. In order to accommodate this situation, URMS allows PennDOT staff to enter information on behalf of a utility. No special action is required to activate this capability; the security settings are already configured in the system.

Utilities that are not business partners and do not have access to URMS should fill out a paper form and send it in to PennDOT staff. Data entered by the PennDOT staff should be based on a form received from the utility, or, at a minimum, a phone conversation could also be a source of data.

**Template Library**

URMS provides optional templates for the user’s convenience in developing and submitting documents to PennDOT for the relocation process.

Find the Template Library page at **Manage Project > Relocation Forms & Requests > Form Templates**. The Template Library lists the available forms by their titles along with a description of how each form can be used.

Click the **Open** text button in the far-right column to download a document for viewing. Look for the downloaded file in a bar across the bottom of the internet browser window or in the computer’s Downloads folder.
Utilities Setup and Updating

The following sections describe how to create a new utility in URMS and edit existing utilities.

Creating a Utility

The option to create a new utility is found in the Admin dropdown list on the menu bar across the top of the page. Navigate to Admin > Utility Companies. Then, scroll to the very bottom right of the page and press the CREATE NEW UTILITY button.

This button will open a page for creating a utility. Enter the utility's name and type and mark it as active. Also complete the fields for Federal ID and SAP Vendor #, if available, and check the box for Is a Municipality if the new utility is a municipal entity.

If the utility has a resource email account, they can enter that email address in the Notification Resource Email Account box to have a copy of each notification be sent to that account. This email address will be CC’d on all URMS workflow notification emails for the utility; however, this only includes workflow notifications, not other URMS emails, such as a message to alert a user that a submitted request was returned.

Next, add an address for the utility by selecting + ADD LOCATION in the Location section and filling in all information in the modal window. At least one location entered must be noted as a Corporate address type.
After adding the location, click the **SAVE** button in the bottom right corner. If the new utility's information is similar to that of an existing utility, the **Potential Matches** window may appear to notify that the new utility being created may already exist in the system. Examine the information displayed to determine if this is the case.

**Creating Service Areas**

With the Utility Information complete, the **Service Area** screen should be showing. Navigate between these screens using the tabs on the left side of the view.

On the Service Area screen, click the **ADD SERVICE AREA** button in the **Select Service Area** section, which opens the Add Service Area modal window. Type in a name for the service area and choose a utility type from the dropdown options. Below those entries is a box that holds all Pennsylvania counties as selectable list. Click the checkbox next to each of the counties that defines the utility’s service area. For a more accurate area, click the arrow to the left of a checkbox to expand a dropdown list showing municipalities within that county.

The user may also click **Select All Counties** above the box to designate all of Pennsylvania as the service area.

After filling all information in the modal, click the **SAVE** button to close the window. Then click the other **SAVE** button on the bottom right of the Service Area screen. The Contacts screen will display after the service area information is saved.
Creating Contacts

Creating contacts allows a utility company to specify primary points of contact at a Corporate, Regional, or Local office. These contacts can then be assigned to a utility service area. Contacts are always utility employees and not consultants. Contacts may or may not be users of URMS. The use of service areas allows URMS to specify a contact based on the location of the project.

On the Edit Utility page, go to the Contacts tab on the left side of the screen, then select Add Contact at the bottom of the Contacts section. This button brings the Add Contact modal window into view.

Fill in all required fields and any additional information before clicking SAVE to close. The available options in the Utility Type, Service Area, and Location dropdown boxes are determined by what was entered in the Utility Information and Service Area screens.

The modal window for the contact information includes a selection box for Oversees all Utility Types. For this field to be active, the utility must have multiple utility types (such as a municipal authority providing both sewer and water service), and the contact must be a URMS user. The checkbox allows that contact person to be added to a project for any of the utility types. If a utility employee should oversee all utility types but does not have a URMS user ID, an alternative approach is to create multiple contact records for that one person—a separate contact for each utility type.

The information for an existing contact can be edited by clicking the Edit text in the Actions column on the right end of the line in the Contacts screen.
Editing Utility Company Information

Both a utility company and PennDOT can revise a utility's information. Utility Company users should go to My Utility > Utility Profile, while PennDOT users can go to Admin > Utility Companies.

In the PennDOT user’s view, the Manage Utilities page has a table listing the existing utilities along with filtering options above the list. To search the records, type a utility name in the first input box in the Filter List section. Existing utilities appear as options in a dropdown list below the text box as the name is being typed. The relevant utility can be clicked from that list to complete the Utility Name text box.

Alternatively, the utility’s other characteristics can be used to filter the search results, such as Utility Type or Municipality. After entering the name or other details in the Filter List, click the APPLY FILTERS button. Any utilities that meet the given criteria will appear in the Results section below. Select the Utility Name from the results to begin editing the utility’s information.

With the utility’s information open, follow the same instructions found in the Creating a Utility, Creating Service Areas, and Creating Contacts sections of this guide to edit those details of the existing utility.

Deleting Utilities

On occasion, a utility profile may need to be deleted, typically because it is a duplicate, outdated, or some similar condition. After confirming this is accurate, checkmark the Permanent Delete box on the Edit Utility screen. Selecting this box does not actually delete the utility profile, but it flags the utility for deletion by the system administrators. Periodically the system administrators will check for these utilities that have been marked and remove them from the system. Be sure to click SAVE at the bottom of the screen after making the selection.

Consultant Agreements

Many utility companies employ engineering consultants to perform utility coordination activities. URMS allows those consultants to work on behalf of the utility company within the application.
Submit a Consultant Agreement

Either a utility company or an engineering consultant that is registered in URMS can begin the process to associate a consultant with a utility company. A copy of the executed agreement between the utility and the consultant is required for action. Begin from the My Utility > Consultant Agreements menu item.

On the Consultant Agreement List, begin by pressing the + ADD CONSULTANT AGREEMENT button.

On the Add Consultant Agreement page, begin by typing the consultant’s name in the Consultant Company field. The field will auto-populate with consultant companies already registered in URMS that match. Then, select the specific person at the consultant that will work in URMS on behalf of the utility. Following that, select whether the consultant will be able to work on all projects that involve the utility or only selected projects. If the consultant will only work on specific project, the MPMS numbers of those project will be able to be selected. Lastly, enter the date that the consultant agreement terminates, as defined within the agreement itself.

A copy of the agreement between the consultant and the utility must be uploaded and saved to the system. Select the file to upload or drag and drop the file into the system and press SUBMIT. A successful upload is indicated by the File(s) Uploaded Successfully banner at the top of the screen.

With a successful file upload, the status changes to "Pending CO Review."
Review the Consultant Agreement

A PennDOT Central Office user can review the agreement and approve it or return it for more information. The review is accessed either from a task on the user’s dashboard or via the top menu Admin > Consultant Agreements. This leads to the Consultant Agreement List page of uploaded consultant agreements. Select the appropriate agreement and press the Review button on the right end of the row. Review the information and the agreement document shown on the page. If the information submitted is adequate, select the APPROVE button. Selecting RETURN FOR MORE INFO requires the entry of a reason and then sends an email notification to the person that submitted the consultant agreement.
Create a Project in URMS

A project must be created in URMS first before any work can be done on it in the system. Only a PennDOT user can create a project. Two types of projects can be created in URMS: MPMS projects and Department Force projects. The following sections detail the process for each. To begin, move the mouse cursor over the Create heading on the top menu bar and click Create DF Project for a Department Force project or Create UR Project for an MPMS project.

MPMS Projects

Typically, the project manager creates an MPMS project when the utility coordination phase is ready for initiation.

Selecting Create UR Project from the Create menu navigates to the MPMS Projects page, which contains a table listing all the MPMS projects that are available to create in URMS. Immediately above the right side of the table is a text entry box with the CREATE button. Use this box to begin a new project by typing in the MPMS number and clicking the button.

If the number belongs to a valid MPMS project, URMS will display the Create New UR Project page. The first section shows the project information taken from MPMS. The next section down is for the scoping field view data, which requires the user to enter a date for the scoping field view. Alternatively, check the box for "No Scoping Field View Planned for this project," if applicable. Enter a note in the large text box and click the ADD COMMENT button below it to save the note to the project.

After entering the information for the scoping field view, click the CREATE PROJECT button at the very bottom right of the screen.

Cancel the creation of the new project while on this page using the CANCEL button at the bottom right of the screen, to the left of the button to create the project. URMS will return to the Dashboard and the new project will not exist in the system.
**Department Force Projects**

Department Force projects are not linked to an MPMS project and can be created at any time. When launched in URMS, a new Department Force project receives a unique project number created automatically by URMS.

Select **Create DF Project** from the **Create** menu to navigate to the **Create Dept Force (Non-MPMS) Project** page. Enter the basic project information in the given entry boxes. All the fields on the page are required, except for Project Comments. The Municipality dropdown populates with valid options after a county is chosen.

![Create Dept Force (Non-MPMS) Project](image)

After completing the Project Information section, enter the information for **PA1Call** and the project location in the subsequent sections. Clicking either the + **ADD PA1CALL** button or the + **ADD LOCATION** button opens a modal window to enter the respective data. At least one record of location information is required, while adding PA1Call is optional.

The final section is a space to upload project plans documents. Click the **SELECT FILES TO UPLOAD** button, choose the intended file from the file explorer modal, then select the appropriate **Document Type** in the row that appears below the upload section. To remove a file that was uploaded in error, click on the **Delete** button at the far right of the row on which the file name appears.
When everything is finished, click the **CREATE PROJECT** bottom at the very bottom right of the screen. URMS will remain on the same page if one of the required fields has not been filled. Otherwise, the Project Information screen appears for the newly created project, which will be in Scoping status.

With the Department Force project created in URMS, all following steps are the same as those for MPMS projects.

**Project Priority**

URMS allows PennDOT users to designate projects as **Critical** or **Emergency** so that the project tasks are prioritized appropriately.

A **Critical project** is one that the District has determined should be given priority. The project then has a yellow exclamation icon next to the MPMS number in the Upcoming Tasks table and the Active Projects table on the Dashboard. Also, tasks associated with a critical project are prioritized to the top of the My Upcoming Tasks section.

**Emergency projects** are those that must be started very soon to replace infrastructure damaged by catastrophic events like a natural disaster. For emergency designation, an emergency proclamation document is required to be uploaded. These projects are indicated by a red exclamation icon next to the MPMS number on the Dashboard lists. These projects are also prioritized in the My Upcoming Tasks section.

If a project is Critical or Emergency, that priority also shows in red letters underneath the Project Status on the Project Page.
To change the Project Priority, go to the Project Information page and click the **EDIT** button to the right of the heading and the menu tabs, near the Manage Project button. The editing view holds the **PROJECT PRIORITY** button at the very top. Click this button to open a window that gives the options to update the Project Priority. A space is also provided to upload a file and assign the **Document Type** as the **Emergency Proclamation**, which is required for an emergency.

Click the **SAVE** button at the bottom right of the window. The priority update window closes, but the editing view will still be open. Scroll down to the very bottom of the page and use the **SAVE** button again to finish updating the project. If required fields of the project information have not been completed, such as the **DURA's SUE Evaluation** or the **Level of Complexity**, then the fields must be filled before the update can be saved.

When a project’s priority is set to Emergency, the system automatically generates the engineering authorization letter and sends it to the involved utilities.
Design Build

After a project is created in URMS, the user may designate it as a design-build project. Go to the Project Information page and click the **EDIT** button to the right of the heading and the menu tabs, near the Manage Project button. The editing view has the **SET TO DESIGN BUILD** button at the very top. Click the button to open the window for entering the required design-build characteristics.

**Scope**: Indicate if the project is a full or partial design-build project.

**Final Design**: Indicate if the final design is complete or not.

**District Work Item #**: Indicate the work item number being used in the contract for the design-build services.

**Drawing Type**: Indicate if the drawing is conceptual or contract.

**Utility Coordination Manager**: Check the box if the project requires a Utility Coordination Manager.

After entering this data, scroll down to the very bottom of the Project Information page and use the **SAVE** button again to finish updating the project.

The same process is used to convert a project from design-build back to a standard project. In the **Update Design-Build Project** window that opens, choose the **Standard Project** option. The fields below it for the design-build characteristics will reset to be empty. **SAVE** and close the window, then use the **SAVE** button again on the Project Information page.
A project identified as design-build has that designation displayed in its Project Status box, at the top left heading of any page of the project, just above the View Checklist link.

**Design Build Emergency Project**

Using the Emergency and Design Build indicators discussed above, a project can be designated as an Emergency Design Build project. In this instance, a Standard Special Provision for an Emergency Design Build can be generated after setting these two indicators. URMS will generate a task for PennDOT Central Office to review and approve the Standard Special Provision.

**Fast Path**

Fast Path projects are those that require only minor utility adjustments and will not have any specific utility lead time. These projects require a Final Plan and skip the Verification and Conflict Identification status and proceed directly to Contract Development.

For a Fast Path project, sending the Confirm Involvement Notification also sends a Project Notification Letter and Engineering Authorization in the same email as the Confirm Involvement Notification.

The option to designate a project as Fast Path is at the end of the Create New UR Project page, just before finishing the MPMS project creation process. Note that the engineering authorization documents will be sent when the project is set to Fast Path.

After starting a Fast Path project, the user is taken to the URMS Dashboard.

The Preliminary Evaluation section on the Project Information screen (below PA1Call) indicates if a project is Fast Path.
To change a project’s designation, whether to be a Fast Path project or to not be Fast Path, go to the Project Page. Find the **EDIT** button on the top of the Project Information area to the right of the heading and the menu tabs, near the Manage Project button. Click the button to open the editing view, in which the Fast Path selection is near the top in the **Provide Preliminary Evaluation** section.

After making the Fast Path selection, scroll down to the very bottom of the page and use the **SAVE** button to finish updating the project. If required fields of the project information have not been completed, such as the **DURA’s SUE Evaluation** or the **Level of Complexity**, then the fields must be filled before the update can be saved.

Recall that for a Fast Path project, a **Final Plan is required** before the Confirm Involvement notification, which includes the Project Notification Letter and Engineering Authorization, can be sent.

**Set PennDOT Project Team**

The PM or another PennDOT user assigns the PennDOT staff members or consultants who will be involved in a project so that they can complete their relevant tasks. These members comprise the Project Team.
As steps are completed in each status of a project in URMS, new tasks are generated for the next requirements to complete. These tasks are assigned to users based on their roles indicated in the Project Team, so setting these PennDOT team roles soon after creating the project is important. Completing this page helps ensure that tasks are given to the correct staff in URMS.

Go to the Project Page to begin establishing the project team. Click Manage Project > Project Team > My PennDOT Team. URMS will navigate to the Project Team page.

The Project Team page lists the team roles required for the project with a selection box beside each one. Use these select boxes to assign a user to each role from its respective dropdown options. A user will already be assigned by default, but these can be changed. After the whole team is assigned, be sure to click the SAVE button at the bottom.
Local Sponsor

Local projects are those that are designated with a 🏛️ icon on the Dashboard page. These projects require that the name of the Local Sponsor be specified on the Project Team page. And have an additional data field on the at the top of the page.
Project Status 1 - Project Scoping

After creating a project, it is set at a status of Scoping. During this project status, the details and complexity of a project will be examined so that PennDOT begins to get an idea of the level of effort that will be required for coordination with utility companies and utility relocations.

Preliminary Plans

Preliminary plans are those that will be used to verify if a utility is within the limits of a highway or bridge project.

Upload Preliminary Plans

One of the steps of the Scoping status is to upload preliminary plans for the project. On the Project Page, click Manage Project > Project Plans > Upload Preliminary Plans.

A task to upload preliminary plans is also created for the user assigned to the Project Designer role for the project, and that task will appear in the Project Designer’s My Upcoming Tasks section.

The Upload Preliminary Plans screen contains a section for documents already attached to the project, followed by another section below where new documents are added. By default a new project has no records or comments in the first section. Scroll down to the section titled Upload Preliminary Plans Documents. Use the button to open a file explorer window and select the document to upload. Once the file finishes uploading, assign the Document Type "Preliminary Plans" through the dropdown selection on the row on which the file name appears. Optionally type a note for the document, then click the UPLOAD DOCUMENT button at the bottom of the page.

Now the newly added plans file is in the upper sectionUploaded Preliminary Plans Documents. Upload additional supporting documents by the same steps, if applicable. Use "Preliminary Plans Supporting Documents" as the Document Type for these additional files.
Alternatively, if there are no existing plans for the project, the user may check the box for **No plans to provide at this time** near the top of the page. Then go to the very bottom right and press the **SUBMIT** button to finish.

**Review Preliminary Plans**

After the Project Designer has submitted the preliminary plans, the Scoping Coordinator has the responsibility of reviewing them. The Scoping Coordinator will have a task on the My Upcoming Tasks section of the Dashboard, or on the Project Page, click **Manage Project > Project Plans > Review Preliminary Plans**.

View the uploaded plans by clicking on the blue File Name, which downloads the file from the browser. Find the document at the bottom of the screen or in the computer’s folders and review the preliminary plans. If the plans are acceptable, click the **ACCEPT PLANS** button at the very bottom right of the page.

Alternatively, the Scoping Coordinator may use the **REJECT** button or the **CONDITIONALLY ACCEPT** button. Conditionally accepting the plans requires an explanation given in a modal box. The plans can still be sent to the involved utilities, as with a full acceptance, but the Project Designer will be notified of the need for updated plans. Rejecting the plans also opens the modal box in which the user must type a reason. With any of these three actions, the date of the action...
and any comment entered are logged in the box titled **Previous Preliminary Plans Comments** at the bottom of the Review Preliminary Plans page.

**Perform Subsurface Utility Engineering (SUE) Evaluation**

The Subsurface Utility Engineering (SUE) process identifies, characterizes, and maps underground utilities, usually early in project development. The SUE Impact Evaluation is a required part of the Scoping phase in URMS, following the preliminary plans upload.

One step in URMS involving the SUE is the DURA’s recommended SUE evaluation level for the project, which is part of the Scoping screens.

Another step in the SUE process is the project manager’s SUE analysis and results in URMS. As the Project Designer or PM, go to the Project Information screen. Find the **Preliminary Evaluation** section and click the link to **View SUE Impact Evaluation**.

On the **Subsurface Utility Engineering (SUE) Evaluation** page, complete a selection for each of the questions in the "SUE Impact Analysis" section according to data collected. Click Save to store the progress entered and/or click Continue to move onto the next tab.
The SUE Detailed Analysis tab presents more questions for the user to answer. After completing these selections, use the SAVE button to save the progress and/or the Submit button to complete the SUE evaluation input. URMS then opens the SUE Impact Results tab showing the "SUE Quality Level" for the project, based on the selections made in the previous tabs. The potential quality levels are A, B, C, and D. If the PM decision differs from the URMS result, the user is asked for a justification. SAVE the entry before returning to the Project Page.

The Utility Unit Oversight user must approve the SUE evaluation that the PM or Project Designer submitted as part of the Scoping status process. As before, find the evaluation by navigating to the Project Information screen and clicking and the View SUE Impact Evaluation link. The SUE Impact Results tab now includes an Approve button at the bottom right of the screen. Click to approve and look for a green "Saved Successfully" box at the top of the page just below the menu bar, confirming that the approval is registered in the system.

Enter Scoping Information on the Project Information Screen

The first location to begin entering scoping data is on the Project Information screen. Go to the Project Information screen and use the EDIT button to the right of the heading and the menu tabs, near the Manage Project button.
Preliminary Evaluation

The top of the editing view has a radio button for the Fast Path selection. Underneath is a dropdown selection box for the DURA’s SUE Evaluation. Choose a SUE Evaluation level of A, B, C, or D based on field data. Then in the next box down, select the appropriate Level of Complexity.

Pennsylvania One Call

The optional PA1Call Information section follows the Preliminary Evaluation section. If no existing records are found, click the + ADD PA1CALL button to open a modal window. Complete all the fields in the window and SAVE the data to successfully implement the PA1Call information.

Segment Equalities

Data entered in the segment equalities section allows URMS to convert locations from Segments and Offsets to Stations and to GPS Coordinates. If preset during the Scoping phase, this conversion capability can come into play when location details are entered for utility conflicts later on.

The segment equalities entered in URMS should be based on the list of segment equalities from the project plan.

Start by clicking the + ADD SEGMENT EQUALITIES button below the table, which opens a new row with multiple input boxes. Enter the SR, Segment, and Offset as well as the corresponding Station value. Then find the Save text button in the Actions column to the right to finish the entry. URMS calculates the Latitude/Longitude coordinates for the entry and displays it in the same row.

Continue to add all of the segment equalities shown on the plan by repeating the same process. The user can also click the Edit text button to revise an existing segment equalities record or the Remove text to delete it.
Scoping Field View

The final section of the scoping information is for the **Scoping Field View Data**. Here the user must input a **Scheduled Date** for the scoping field view, if not already entered. Alternatively, use the checkbox for "No Scoping Field View Planned for this project" if no field view will be done.

Be sure to use the **SAVE** button at the very bottom right of the page to store any information entered.

When all Scoping Field View activities are complete, the checkbox for **All Scoping Field View Activities Complete** near the end of the page must be checked. If the checkbox cannot be selected, then the prerequisite tasks are incomplete. The checkbox is required before the **Confirm Involvement Notification** can be sent to utilities.

Enter Scoping Costs

URMS allows a PennDOT user to enter a scoping-level estimate of relocation costs. These costs can be used as a level of magnitude estimate and can be compared with the utility funding programmed in MPMS.

These scoping costs are contained on the **Utility Costs & Funding** tab of the **Project Information** page. On that page, press the **EDIT** button to be taken to the **Edit Utility Costs Page**. Press the + **ADD UTILITY TYPE** button and then the **Edit** button on a row in the table to begin entering data in that line. The system captures costs at the Utility Type level, but notes can be added to the line to specify a utility or any other data to be recorded. Press the **Save** button to store that data in the line. The system totals all costs entered.

Enter Milestone Dates

The Scoping phase also involves entering dates for the **Project Milestones**. Milestone dates should be set before sending the **Confirm Involvement Notification**, so that the utilities tasks are given correct due dates.

Select a project to go to its Project Information screen. Click the **Utility Milestones** tab on the row of tabs above the project information.

Each milestone activity has a row of dates in the Utility Milestones section. Click inside one of the boxes in the **Project Schedule** column to highlight the text and type in a new date. Alternatively, click the calendar icon on the right side of the text box to open a calendar and select a date from there. Be sure to click the **SAVE** button at the bottom right corner after making any changes.

Rather than entering or selecting each date individually, all the dates can be automatically generated with the **USE SUGGESTED SCHEDULE** button above the top left of the table. In that case URMS fills the Project Schedule dates with the Suggested Schedule dates that it calculated.
Assign Utilities and Contacts

Every utility company that has facilities within the project limits or could potentially be impacted by the highway project should be assigned to the project. If no utilities will be impacted, that must be specified in URMS as well. In either case, start this step by going to the Project Page: select the MPMS number from the Upcoming Tasks or Active Projects list on the Dashboard, or search the MPMS number in the search box on the right of the menu bar at the top of the screen.
While on the Project Page, click the **Manage Project** > **Project Team** > **Assign Utilities to Project**. The Utilities & Contacts page that follows has two options.

For projects with no impacted utilities, press the **NO UTILITIES** button under the Select Utilities section heading. A Confirmation message appears, alerting that this action will move the project directly into **Contract Development** status, bypassing the stages of Verification, Conflict Identification, and Conflict Resolution that are performed in a typical URMS project.

In many cases at least one utility will be added to the project. The **+ ADD UTILITY COMPANY** button opens a modal window giving a list of utilities for selection. Within this window, use the input boxes at the top to filter the options by entering the filter criteria and clicking the **APPLY** button.

If a utility appears in the Utility Name autofill options but no records are found after pressing **APPLY**, the utility may be set as inactive in URMS. First, be sure there is no duplicate of that utility which is already active. Then follow the steps in **Editing Utility Company Information** to change the **Is Active** field in the Utility Information section.

Any utility with a flag icon beside its name is missing necessary details in its contacts or service area information. It cannot be added to a project until that required information is completed. See the link above for editing utility company information.

Once the utility’s checkbox is selected, use the **ADD** button at the bottom right to add the utility to the project and close the modal window, or use the **ADD & SEARCH AGAIN** button to add the utility and continue searching and selecting more.
The Utility Name, Address, and Type now show in the Utilities & Contacts screen. If a selected utility should be removed from the list, use the **Remove** button near the right end of the utility’s information line.

Now the contact(s) can be added for the utility for the project. Click **+ ADD CONTACTS** just below the utility’s name to open the **Select Contact** modal window with a list of all the contacts that have been created for that utility. Select and submit any of them for inclusion in the project. Selected contacts will show under the utility in the Utilities & Contacts screen.

Be sure to click the **SAVE** button at the bottom right of the screen after the utilities and their contacts have been added.

If the contact that you would like to add to the project cannot be found, you can add that contact as described in [Creating Contacts](#).

If the user attempts to save a utility to the project without adding a contact for the utility, URMS displays an error message and does not save the added utility.

**Send Confirm Involvement Notification**

Utilities are notified about the upcoming PennDOT project using the **Confirm Involvement Notification**. To send this notification to a utility, Preliminary Plans must have been uploaded and approved so that they can be delivered as part of the notification process. In addition, the **All Scoping Field View Activities Complete** checkbox on the main **Project Information** tab must be checked.

Click the **Manage Project** button on the Project Page and choose **Workflow Notification** in the dropdown menu. URMS navigates to the **Project Workflow Notification** page.

From this page, the notification can be sent to all utilities at the same time using the **CONFIRM INVOLVEMENT NOTIFICATION** button or only to selected utilities using the **SEND** buttons shown below.

The notification is sent to the utility user designated as the contact on the Add Utilities screen.

If the project is a **Fast Path** project, final plans must have been uploaded and approved before you can send the notification. For Fast Path projects, the email sent to the utility includes the engineering
authorization project notification letter as an attachment, in addition to the Utility Involvement Form. If not Fast Path, the email only includes the involvement notification attachment.
Project Status 2 - Verification

After the Confirm Involvement Notification is sent to the utilities, the project status progresses to Verification. During the Verification status, the utilities are requested to confirm if they are within the project’s limits and therefore need to be involved in utility coordination efforts.

Review Preliminary Plans and Confirm Involvement

The utility user that received the Confirm Involvement Notification has the responsibility to review project plans and determine if the utility is involvement in the project by indicating if it has facilities within the project limits. The confirmation process also involves reviewing the preliminary plans uploaded for the project.

Follow the link in the email notification to the Utility Involvement Form. Alternatively, to manually navigate to the form in URMS: go to the relevant project and then use the menu Manage Project > Relocation Forms & Requests > Utility Involvement.

The Utility Involvement page displays all files that have been uploaded for the project in URMS. This screen is where the preliminary plans are available for review. The user can open any of these documents by clicking on the file name to download it.

If a PennDOT user is completing the involvement form on behalf of a utility, begin by selecting the utility and its type from the dropdown options. Next enter the date the utility's information was received in the Date Received box. Near the bottom of the page, answer the question of the utility being within project limits.
If the user is from the utility, the utility's name and type should already be mentioned at the top. Start completing the involvement by indicating whether the utility is within the project limits.

Just below this field is a check box to **Request to incorporate the adjustments into the department's highway contract.** Upon selecting this option, the user is notified that an Incorporated Work Request form will need to be uploaded for the project.

If "No" to the utility being within project limits, then complete the involvement form by clicking the [SUBMIT] button at the very bottom right, which is available once all required fields are filled. A green bar across the top of the page confirms the submission was successful.

If the selection is "Yes," the [CONTINUE] button at the bottom right becomes available, along with the tab [Utility Attachments and Materials] to which the button navigates.

On the Utility Attachments and Materials page, indicate if future work is planned. Choosing "Yes" generates a new empty table in the [Work Planned] section. Click the [+ ADD WORK PLANNED] button and fill in all fields in the modal window.

Similarly, choosing "Yes" for the [Underground Materials] section adds a new table to the section as well as a button to [+ ADD MATERIAL]. Click the button to open another modal window, then fill in all its fields, and [SAVE] the information to see it added to the table list in Underground Materials.
The Utility Attachments and Materials page also lists any Bridges within Project Limits and Bridge Occupancy Licenses. The last section is Attachments to Bridges. Click the + ADD ATTACHMENT button to open another modal window. Fill the required fields for the selected bridge within the project limits, then click SAVE to close it.

Use the SAVE button at the bottom right of the page at any time to save the data entered and continue working on the page. Click the CONTINUE button to finish the page and move onto the Marked-Up Plans tab.

Upload Marked-up Plans

As part of the Confirm Involvement process, utility companies should upload as-built plans or marked-up PennDOT plans that show the location of existing facilities. The lower part of the Marked-Up Plans tab has a section to upload documents for the marked-up plans. If marked-up plans exist for the project, drag and drop a file into the "DROP FILES HERE" space or click the SELECT FILES TO UPLOAD button and choose the document from the computer's folders. Once the file uploads and the file name appears at the bottom of the page, select a Document Type and type in any notes.
Alternatively, if there are no as-builts or marked-up plans for the project, click the checkbox for **No plans to provide at this time** near the middle of the page.

Once the Marked-Up Plans page is complete, click the **SUBMIT** button at the bottom right to finish the utility involvement confirmation. A green bar across the top of the page confirms the submission was successful.

**Set Utility Project Team**

Just as the PennDOT project team must be established, the utility must also assign the contacts for its team in URMS. As a utility user, go to the Project Page and choose **Manage Project > Project Team > My Utility Team**.

The **Project Team** page that opens has a list of roles in the utility team, each with a box of dropdown options. Use the boxes to assign an individual from the utility to each of the required roles. After selections have been made, click the **SAVE** button to save the entries.

The utility contacts chosen for each role will then be seen on the **Project Contacts** page. To view the project contacts, go to **Manage Project > Project Team > Project Contacts List**.

**Incorporated Work**

After the Confirm Involvement notification has been received, the utility can begin the incorporated work process by submitting the incorporated work request. The request should meet the standards

By default, the Incorporated Work Document List is empty. Click the UPLOAD/REVIEW DOCUMENT button to open the page for uploading new incorporated work documents. On that next screen, the line in the top-most section for Utility - Utility Type should already be filled in with the utility of the user who is completing the form.

Go down to the Upload Incorporated Work Documents section. Use the button or the drag-and-drop space to upload a new file. Once the File Name appears at the bottom of the page, select Incorporated Work Request Letter for the Document Type. Optionally enter a note in the last column, then press the SUBMIT button to the bottom right.

Look for a green bar across the top of the page confirming the upload was successful. Likewise, the new file will be listed in the Incorporated Work Documents section above the upload area as well as on the previous page, the Incorporated Work Document List.

The incorporated work document is now in "Pending District Review" status.
Next, the District Conflict Coordinator must review the new document. Go to the Project Page, then Manage Project > Relocation Forms & Requests > Incorporated Work. The submitted document should be showing in the list.

Open the reviewing screen by clicking Review in the Actions column or by clicking the UPLOAD/REVIEW DOCUMENT button below. On the Upload Incorporated Work Documents page, first choose the Utility - Utility Type from the selection box at the top.

The incorporated work document(s) that the utility uploaded are listed in the next section down. Click the blue File Name of a document to download it, then open and review the downloaded file.

When the review is finished, go to the bottom right corner and press APPROVE to approve the incorporated work request or RETURN FOR MORE INFO to return the request to the utility to make necessary changes. Choosing to return it requires a reason to be typed into a modal window, which will then generate an email notification to the person that submitted the request.

If the project is a local project, the request must also be reviewed by the team member in the Utility Unit Oversight role. In this case, after approval by District staff, the request enters the status "Pending Utility Oversight Review." The Utility Unit Oversight role can find the task in the Upcoming Tasks table of the Dashboard or find the Incorporated Work Documents List through the MANAGE PROJECT button on the Project Page. Follow the same steps as above to review the document. Once the Utility Unit Oversight role approves the incorporated work form, the request process is complete.

If an incorporated work form was returned, the utility must return to the Incorporated Work Document List. Press the UPLOAD/REVIEW DOCUMENT button. On the following page, the previously uploaded file is given in the Incorporated Work Documents. Update the file by clicking the Update action text at the far-right end of the same line. This action opens a modal window in which to add the new version of the document. Use the button to select the file or drag and drop the file into the upload area. Once the file finishes loading in the window, optionally enter a Note, then press the UPLOAD button.

The update applied to the document is reflected in the Version field in the file list. Updating the version puts the request back into Pending District Review status until the PennDOT staff reviews it again.

Once the request has received all required approval, it will be displayed as "Approved" in the Status column on the Incorporated Work Document List.
Request Authorization for Preliminary Engineering

If a utility expects to incur reimbursable costs during the Confirm Involvement phase, it may request Authorization to Proceed with Preliminary Engineering from PennDOT. The utility requests this authorization outside of URMS by contacting the District Utility Unit directly. If PennDOT approves the request, the District Utility Unit will create an Authorization to Proceed with Preliminary Engineering letter (Figure A-520) and upload it to URMS. The utility may then review and download or print the letter from URMS.

Request Authorization to Use Consultant Engineer

Many utility companies employ engineering consultants to perform utility coordination activities. URMS allows those consultants to work on behalf of the utility company within the application. If a utility’s engineer has not yet been authorized to work on the utility coordination and design for the project, proceed as described in the Consultant Agreements section.

Test Hole Request and Approval

Test holes are often used to locate subsurface utility facilities. Entering the highway right-of-way to dig a test hole requires a Test Hole Permit. To start the test hole request process, click the Manage Project button on the Project Page, hover over Relocation Forms & Requests in the dropdown menu, and select Test Holes from the Relocation Forms & Requests options.

The Test Hole Requests page shows all existing test hole records in table format. By default, it will be empty. Find the + ADD NEW REQUEST button below the table, which opens the Test Hole Request editing view. This page contains project information followed by test hole locations, traffic control patterns, and supporting documents. Any previously entered locations, traffic control patterns, and documents will be showing in each of their respective tables.

First, fill out the Project Information section. Select the utility from the dropdown input box, then enter a date in the Received Date box. Also type any Permit Conditions in the large entry box.

Next click the + ADD LOCATION button in the Test Hole Locations section of the page. A modal window contains required entries for the user to complete.
After the location information is entered and saved, the new record appears in the table of test hole locations. Records are editable using the Edit or the Remove actions on the right end of the table.

For the traffic control patterns, click the + ADD PATTERNS button. A modal window appears containing a list of Pennsylvania Typical Application (PATA) documents. Each of the documents is available for viewing as a PDF with the Open text button on the right side of each line. This button downloads the PDF file to the user’s computer; look for it at the bottom of the browser screen or in the computer's Downloads folder.

Click the SAVE button to save any selections and close the window.

Take note of the Pavement Cut checkbox below the + ADD PATTERNS button. If the user marks that the pavement cut will be performed, a restoration plan must be uploaded as a supporting document.

Use the SAVE button to save any information entered and continue editing. Once all the information is complete, click to SUBMIT the request. The new request then shows on the Test Hole Requests page in "Submitted" status with the date it was entered.
Next, the DURA reviews the request for approval. Go to the Test Hole Requests page, find the new request in the table, and click the **Review** text in the **Actions** column.

The District user then sees the same screen on which the test hole information was entered by the utility. Entries are editable, and new records can be added for test hole locations, traffic control patterns, and documents. Review the information in each section, then find the buttons at the bottom right of the page.

**CANCEL** returns to the previous screen without saving any edits.

**RETURN FOR MORE INFO** sends the request back to the utility. A modal window opens that requires a reason to be typed in to explain to the utility what is still needed before approval. An email notification is sent to the person that submitted the request, and the request is put into "Returned" status until the utility user makes changes and submits it again.

**APPROVE** completes the test hole request, which will then show in "Approved" status. On the Test Hole Requests page, the Actions column has new actions available for the request: **View Permit** downloads a PDF of the test hole permit, and **Upload Results** opens the page Upload Test Hole Results.

After the test hole is dug and the utility’s facility location is confirmed, the results can be uploaded to URMS. The first section of the **Upload Test Hole Results** page shows any existing results documents that were previously uploaded. The second section provides a space to upload a new document.

Once the file uploads and the file name appears at the bottom of the page, select **Test Hole Results** for the **Document Type**, optionally type any notes, and click the **UPLOAD DOCUMENT** button to finish. Look
for a green bar across the top of the page confirming the upload was successful. Likewise, the new file will then be listed in the first section for existing uploaded test hole results.

Close Out Verification Status

The District Conflict Coordinator closes the Verification status of a project by completing a review of the involvement for all utilities added to the project. From the Project Page, navigate to Manage Project > Utility Forms & Requests > Utility Involvement (All Utilities View).

Review the Utility Indicators section at the top of the Utility Involvement (All Utilities View) page. The added utilities are listed with their responses to each of the fields in the Utility Involvement form: within project limits, work planned, underground materials, plans provided, and incorporated work. These fields should all be populated with either "Y" or "N" (Yes or No) in the table; ensure there are no null values, meaning that involvement information has been entered for all the utilities.

A District user may enter the involvement confirmation on a utility's behalf using the ADD UTILITY INVOLVEMENT button beneath the Utility Indicators table. This opens the Utility Involvement page, on which the user can select the utility from a dropdown box, enter the date the information was received from the utility, and answer if they are within the project limits. If yes, continue through the tabs on the Utility Involvement page and complete all the fields. The Confirm Involvement section of the User Guide explains these tabs further. Remember to SAVE any revisions or SUBMIT the completed involvement.

Another way to review the project documents submitted by one of the utilities is to click the blue Utility Name in the table, which also opens the Utility Involvement form.

The sections following the Utility Indicators provide any information that has been entered for work planned, underground materials, and attachments to bridges for each of the utilities.

If the reviewer confirmed the involvement is complete for every utility, click the box to Check this field if all the utilities have completed the Involvement found in the Utility Indicators section. Then also press the SAVE button next to the check box. Look for a green bar across the top of the page indicating the input was saved successfully. The project should now be in Conflict Identification status.
Project Status 3 - Conflict Identification

Description of Utility Conflict Matrix (UCM)

Conflicts entered for a project in URMS are displayed together in a utility conflict matrix (UCM). The UCM is on the Project Page in the Conflict Management tab. This screen displays a table with a row for each conflict that has been entered for the project. All the completed fields defined for the conflicts are visible in the table; scroll to the right to see more columns.

<table>
<thead>
<tr>
<th>Conflict ID</th>
<th>Owner ID</th>
<th>Utility Name</th>
<th>Utility Type</th>
<th>Action</th>
<th>Date Created</th>
<th>Local Road Name</th>
<th>State Route</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>698</td>
<td></td>
<td>Columbia Gas of Pennsylvania, inc.</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>699</td>
<td></td>
<td>Columbia Gas of Pennsylvania, inc.</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>700</td>
<td></td>
<td>Columbia Gas of Pennsylvania, inc.</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0051</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>701</td>
<td></td>
<td>First Energy Corp</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>702</td>
<td></td>
<td>First Energy Corp</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>703</td>
<td></td>
<td>Zions Group LLC</td>
<td>Telecom</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>704</td>
<td></td>
<td>First Energy Corp</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>705</td>
<td></td>
<td>PPL Electric Utilities Corporation</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>706</td>
<td></td>
<td>Zions Group LLC</td>
<td>Telecom</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>707</td>
<td></td>
<td>First Energy Corp</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>708</td>
<td></td>
<td>PPL Electric Utilities Corporation</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>709</td>
<td></td>
<td>First Energy Corp</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>710</td>
<td></td>
<td>First Energy Corp</td>
<td>Electric</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>711</td>
<td></td>
<td>National Fuel Gas Distribution Corporation</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>712</td>
<td></td>
<td>National Fuel Gas Distribution Corporation</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>713</td>
<td></td>
<td>National Fuel Gas Distribution Corporation</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>714</td>
<td></td>
<td>Pennsylvania American Water Company</td>
<td>Water</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>715</td>
<td></td>
<td>Pennsylvania American Water Company</td>
<td>Water</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>716</td>
<td></td>
<td>Pennsylvania American Water Company</td>
<td>Water</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>717</td>
<td></td>
<td>Peoples Natural Gas</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
<tr>
<td>718</td>
<td></td>
<td>Peoples Natural Gas</td>
<td>Natural Gas</td>
<td>Edit</td>
<td>02/21/2020</td>
<td>0010</td>
<td>10M</td>
<td></td>
</tr>
</tbody>
</table>

The PennDOT user can edit an existing conflict by clicking the Edit text in the Action column. This opens the Manage Conflict screen, in which any of the fields of the conflict can be changed.

The Manage Conflict screen has additional tabs for viewing. Documents lists any files that were included in the conflict entry and allows for uploading new files. The RPI tab gives a table list of any Real Property Interest associated with the conflict. Lastly, Resolution(s) shows resolutions that have been entered in the system for the conflict. At any point on the Manage Conflict page the user can click the text to Return to Utility Conflicts in the upper left corner to go back to the overall Conflict Management page.
Next to the Edit button in the Action column of the UCM, the Remove action deletes the existing conflict from the project. Conflicts cannot be removed after the project advances from Conflict Identification status to Conflict Resolution.

Whereas PennDOT staff see all the conflicts of the project on the Conflict Management Screen, utility users only see the conflicts in which their own utility is involved. Capabilities are limited as well. In the Action column of the table, the Remove action is unavailable. The utility does have the Edit action in each row of the matrix to open the Manage Conflict screen for that conflict. However, they primarily can only view the fields of information on the page, which are grayed out, except for a select few that are editable, such as the size, material, and ID of the facility. In the Document tab of the Manage Conflict screen, the utility can upload additional documents to the conflict record.

For a description of each data field in a conflict in URMS, view the Glossary of Conflict Fields below.

**Glossary of Conflict Fields**

**Conflict ID** – The unique identification number assigned to the conflict in URMS

**Owner ID** – For attachers, the Conflict ID for the facility on which it is attached
Name/Description

Utility Name – A dropdown list provides options of utilities to choose from based on the utilities that have been added to the project in URMS for involvement.

Utility Type – A dropdown selection that populates based on the Utility Name selected; only types previously defined for the chosen utility will be available.

Conflict Description – A required text box in which to type a brief statement that makes the specific conflict easily identifiable.

Location Information

County – Pre-populates with the project’s county pulled from the MPMS data.

SR – State Route number on which the occupancy falls, selected from a dropdown list with all possible SRs in the county.

Local Road Name – An optional entry for the name of the road where the occupancy is located.

Occupancy Type – Located, Crossing, Longitudinal, or Project Wide.

- Located – A facility at a single point location.
- Crossing – An underground facility that crosses underneath the roadway from one side to the other.
- Longitudinal – An underground facility running generally parallel to the roadway.
- Project Wide – Includes all facilities of a utility within the project limits. This occupancy type applies to facilities that all must be adjusted vertically to a new roadway elevation. Typically, this involves facilities such as valves, vaults, and manholes that lie within the paved roadway.
  - Selecting "Project Wide" will gray out all the fields except for Facility Type, Installation Date, ROW Established, Recommendation, and Estimated Cost.

Station or Segment – A dropdown selection to define the location either by segment information or by station information.

Begin Station – The station location of a located occupancy, or the station marking the beginning of a longitudinal or crossing occupancy. If the user does not type the number in station format of ####+## (e.g., "0021+10"), URMS automatically attempts to convert the digits entered.

Direction – The direction of travel for the portion of the roadway where the conflict is located. This field is only activated for areas of divided highways or if Segment Equalities have not been defined.

Center Station – The middle point of a crossing occupancy; only available for input if "Crossing" is indicated in the Occupancy Type field.

End Station – The station marking the end of a longitudinal or crossing occupancy.

Begin Segment – The segment location of a located occupancy, or the segment marking the beginning of a longitudinal or crossing occupancy. The dropdown options are limited based on the project’s defined limits.

Center Segment – The segment marking the middle of a crossing occupancy; not relevant to located or longitudinal occupancies.
End Segment – The segment marking the end of a longitudinal or crossing occupancy. The dropdown options are limited based on the project’s defined limits.

Begin Offset – The place within the Begin Segment where the located facility is found or where the longitudinal/crossing facility starts; the offset is the number of feet from the beginning of the segment.

Center Offset – The place within the Center Segment where the crossing facility lies; not relevant to located or longitudinal occupancies.

End Offset – The place within the End Segment where the longitudinal or crossing facility ends; the number of feet from the beginning of the End Segment.

C/L Distance – The distance of the conflict from the road’s centerline in feet. For a linear conflict, record the distance to the closest point of the conflict.

L/R – The side of the road on which the facility lies: Left, Right, or Crossing.

Conflict LF – A number value for the linear feet of the conflict, measured along the centerline of the facility.

Facility Information

Location Type – Aerial pole owner, Bridge Attachment, or Underground.

Facility Type – A dropdown list of types corresponding to the service being provided by the utility’s facility (e.g., Cellular, Electric, Municipal, Unknown).

Depth – Depth underground that an underground utility line lies in feet.

Duct Bank – Yes or No for an underground facility; grayed out for other facilities.

Duct Count – Typed numeric value; grayed out if there is no duct bank.

Size – The diameter of an underground utility facility in inches.

Material – A dropdown list to choose the facility’s primary material. Located (pole) conflicts should identify the material of the pole.

Facility ID – A unique identification value that the utility has designated for the facility.

Attacher Facility ID – Typed alphanumeric value to create an identifier for the attacher/rider (only displays when adding and attacher conflict).

RPI Information

Existing ROW Status – A dropdown selection of Required, Existing Legal, Private, or Unknown to indicate the type of right-of-way in which the facility is currently located.

Applies to Proration – "Yes" if the conflict is a physical conflict that should be used for RPI proration calculations; "No" if the required ROW is overtaking the facility only and relocation is not needed (will not be used for proration calculation).

Substitute ROW – An indication of whether the utility will request substitute right-of-way. Yes, No, or Potential. The utility will only be able to request substitute right-of-way if the field is set to Yes or Potential.
**Real Property Interest** – The status of a real property interest claim by the utility. The field is filled in during the RPI process only if the utility is claiming RPI.

**Installation Date** – The date that the facility was installed in its current location. The field is filled in during the RPI process only if the utility’s facility is within the legal right-of-way.

**ROW Established** – The date that the legal right-of-way was acquired. The field is filled in during the RPI process only if the utility’s facility is within the legal right-of-way.

**Compensable Linear Feet** – The linear feet of the conflict that are compensable based on a determination of real property interest. The field is filled in during the RPI process.

**Private Status Eligibility** – A private status will be granted to a conflict that is overtaken by required right-of-way. A utility with private status will have a private status agreement (if not moving or receiving no reimbursement) or have private status added to reimbursement agreement. This field is filled in during the RPI process.

**Conflict Analysis**

**Conflict Determination** – The recommended action to be taken to resolve the conflict.

- Accommodate in Place (Private Status req.) – The facility does not have to be moved to resolve the conflict. This option is mostly used for conflicts that involve a facility that is in the required right-of-way but is not impacted by construction activities. This conflict does not require a resolution.
- Adjustment in Place – The facility will be vertically adjusted while remaining in the same location.
- Avoided (via Design Change) – The conflict was identified but was later completely avoided by a change in the project’s design. This option allows the conflict to remain with the project for complete documentation and requires the entry of the cost savings of the avoided conflict. This conflict does not require a resolution.
- Not Affected – This facility was identified as a conflict but was later determined to not be affected by the project. This conflict does not require a resolution.
- Provide outage - Long Term
- Provide outage - Short Term
- Protect in Place (requires utility resolution)
- Relocate facility - Permanent
- Relocate facility - Temporary
- Remove facility - Permanent
- Remove facility - Temporary
- Undetermined

**Estimated Savings if Avoided** – Approximate expected dollar amount saved by avoiding the relocation of this conflict. This field is only activated if the Conflict Determination is set to Avoided (via Design Change).

**SUE Level** – SUE level for the conflict - A, B, C, or D.

**Test Hole #** – a number value typed by the user for a test hole involved in the underground facility relocation. The input box is grayed out unless "Underground" is chosen for the Location Type.
Defining Conflicts

A conflict is the portion of a utility’s facilities located within the limits of a project that requires protection, adjustment, or relocation to permit the safe and economical construction, maintenance, and operation of the highway or bridge. A conflict also exists when a utility’s real property interest is subject to property damages from the acquisition of right-of-way for the project.

The conflicts created for a project are used to calculate the proration percentage for any reimbursement that a utility may be entitled to.

The defined limits of a conflict should reflect the actual portion of a facility impacted by the project, and the conflict may be smaller than the full length of the facilities that the utility chooses to relocate or adjust.

Each facility with a single location is considered "located" and identified as its own individual conflict. Facilities can also have a "project wide" location designation when numerous similar facilities exist throughout the project area and require adjustment.

The Project Manager and District Utility Unit identify all the utility conflicts for a project and enter them into URMS. A utility may add additional work outside of conflicts, categorized as Supporting Work.

View conflicts for a project by navigating to the Conflict Management tab on the main landing page of a project. The Conflict Management area contains a table with a row of information for each of the existing conflicts, which can be filtered using the selection options under the table headers. To define a new conflict, click + ADD CONFLICT below the table.

The resulting page that opens has many entry field boxes, with which the user gives all necessary details pertaining to the conflict, including a recommendation for the action to take to resolve it.

Complete the entries, then find the four action buttons following them. Choosing CANCEL returns to the Utility Conflicts screen without saving any of the information entered, while SAVE completes the conflict creation (if all required fields have been filled) and returns to the Utility Conflicts screen, where the new conflict will then be visible. Selecting ADD ANOTHER CONFLICT saves the new conflict and refreshes the Add Conflict page, so that an additional conflict can be created immediately. Finally, ADD ATTACHER/RIDER shows the Add Attacher screen, on which details can be entered for a utility that is attached to the facility owned by the utility in conflict. See the Owner vs. Attacher, Owner vs. Rider section for an explanation of the distinctions between owners and attachers/riders.
If a conflict is already defined and showing in the Utility Conflicts table of the Conflict Management page, the details are still changeable, and a new attacher/rider can be added as well. Click the Edit text link on the row of the project. The Manage Conflict screen will appear, where the entry fields for the project can be edited. Be sure to click the SAVE button at the bottom right corner to keep any changes made. Use this same screen to add an attacher/rider to the conflict with the ADD ATTACHER/RIDER button at the bottom right, next to the SAVE button.

Once all the conflicts are in URMS, select the checkbox for Conflicts entered and ready for Utility Resolutions on the Conflict Management view and then click the SAVE button beside it.

**Owner vs Attacher, Owner vs Rider**

An attacher is an aerial utility line that makes use of another utility's pole already in place. For example, "Utility A" may have a telecommunications wire that is attached to the poles that are owned by "Utility B." In the same way, a rider is an underground utility line that rides inside another utility's conduit, carrier pipe, or duct bank. An attacher/rider has specific steps in URMS for conflict identification, adding supporting work, and conflict resolution that differ slightly from the steps for a facility owner.

During the conflict identification process, the owner's facility must be entered first before the attacher/rider can be added.

When resolving the conflict, an attacher/rider can “follow” the owner’s resolution, but the owner resolution must be entered before an attacher/rider can follow.

**Add Attacher or Rider Conflict**

To add an attacher/rider conflict, find the existing conflict of the owner in the Utility Conflicts table of the Conflict Management tab, then click the Edit text in the Action column of the owner’s row. Scroll to the bottom of the owner’s Manage Conflict page that opens. Click the ADD ATTACHER/RIDER button to open the Add Attacher page.
Most of the fields on this page are grayed out because the values are automatically taken from those entered for the owner facility. For the attacher/rider the user must only complete the entries for Utility Name, Utility Type, and Facility Type and optionally the entries for Applies to Proration, Substitute ROW, Installation Date, ROW Established date, and Estimated Cost.

Finally, click the **SAVE** button at the bottom right of the Add Attacher page to finish the attacher information. Alternatively choose the **ADD ANOTHER ATTACHER/RIDER** button to complete the current attacher facility and restart the form for another new one.

**Final Design Plans**

**Upload Final Design Plans**

Click the **Manage Project** button on the Project Page, hover over **Project Plans** in the dropdown menu, and select **Upload Final Design Plans** from the Project Plans options.

Near the bottom of the page is the **Upload Final Design Plans Documents** section. Drag and drop a file into the box or use the **SELECT FILES TO UPLOAD** button to browse for a document in the computer’s files. The added document then appears in the file list below the drop box. Select a **Document Type** from the dropdown options and optionally enter a note for the design plans, then click the **UPLOAD DOCUMENT** button at the very bottom left.
A green bar shows near the top of the screen to indicate the upload was successful. The newly uploaded document also appears in the top section of the page titled "Uploaded Final Design Plans Documents."

If there are no existing plans for the project, the user may check the box for **No plans to provide at this time** near the top of the page. Then go to the very bottom right and press the **SUBMIT** button to finish.

To remove an uploaded file, click on the blue **Delete** text at the right end of the file’s row. The **Update** text button allows the user to replace a file with a new version. A modal window provides space to select and upload the replacement file. The update is then indicated by the number in the **Version** column in the uploaded plans table.

**Review Final Design Plans**

Once the final design plans are uploaded, the Conflict Coordinator reviews and responds to them. Find the project in the **Upcoming Tasks** table of the Dashboard, or search the MPMS number, then click the **Manage Project > Project Plans > Review Final Design Plans** from the Project Plans options.
Reviewing the final design follows a similar process as reviewing the preliminary plans. Any uploaded final design files are listed on the Review Final Design Plans screen. Click a file name to download and view the document. Optionally input any notes into the Final Design Plans Comments text box just below the file list, then save the notes with the ADD COMMENT button.

At the bottom of the page are the buttons to REJECT, CONDITIONALLY ACCEPT, and ACCEPT PLANS. Choosing to reject or to conditionally accept requires a reason entered in the text box that appears.

Resolve Conflicts Notification and Engineering Authorization

URMS sends a Resolve Conflicts Notification and generates the Engineering Authorization for each utility involved in a project when the Conflict Coordinator determines that all conflicts have been entered. The following requirements must be met to activate the button for the Resolve Conflicts Notification:

- Milestone dates entered
- Utilities confirmed involvement
- Conflicts added
- Preliminary and Final Design plans approved

The Conflict Coordinator must select and save the checkbox for Conflicts entered and ready for Utility Resolutions. The checkbox is located at the top of the Conflict Management page for the project.

If the prerequisite tasks are complete, the Conflict Coordinator may send the Engineering Authorization to individual utilities using the SEND buttons in the Resolve Conflicts Notification column of the
Workflow Notifications screen. Alternatively, above the Utility Notifications table is the **RESOLVE CONFLICTS NOTIFICATION** button that sends to all utilities in the project at once.

Each involved utility receives the notification to resolve conflicts. The Engineering Authorization document can be found in the notification email as a file attachment.

Another place to find the Engineering Authorization document is the Project Checklist screen. From the Project Page, click the **View Checklist** link at the top left corner of the screen below the project status. On the **Project Checklist** view, find the column for the specific utility. If the **Engineering Authorization Issued** step is check-marked as completed, then the line has a blue **View** link. Click this link to download the Engineering Authorization file.
Project Status 4 - Conflict Resolution

A project enters Conflict Resolution status after the Resolve Conflict Notification has been sent to the utilities through the Workflow Notification page. This means that conflicts have been identified and the Conflict Coordinator has reviewed and approved the final design plans. Each utility then receives a notification that the conflicts are ready to be resolved and a Task on the Dashboard.

Utilities Using a Consultant Engineer

Many utility companies employ engineering consultants to perform utility coordination activities. URMS allows those consultants to work on behalf of the utility company within the application. If a utility’s engineer has not yet been authorized to work on the utility coordination and design for the project, the utility should add the consultant as described in the Consultant Agreements section.

Reviewing Conflicts

The utility user can begin to review their conflicts by following the link in the email notification, clicking on the task in My Upcoming Tasks on the Dashboard, or by navigating to the Project Page in URMS and selecting the Conflict Management tab at the top.

From this tab, the utility can see all the conflicts that have been identified for its facilities. A utility may view the details of the conflict by clicking the Edit button for an individual conflict.

The Edit button takes the user to the Manage Conflict screen. A utility user may edit three data items on this screen: Material, Facility ID, and Size (in).

Following its review of the conflicts, the utility has two main tasks: adding supporting work and then resolving the conflicts and supporting work with relocations or other protection measures.

Supporting Work

Supporting work is relocation activity outside the limits of a conflict that the utility identifies as necessary for resolution of the conflict itself. This work may include protection, relocation, or adjustment of facilities. Examples of supporting work include additional pole relocations and pipe replacement determined necessary by the utility that are outside the conflict limits. Unlike conflicts, supporting work is not used in determining proration.

To add supporting work to a project in URMS, navigate to the Project Page and then click the Supporting Work tab to view the Supporting Work Items details.
Use the **+ ADD SUPPORTING WORK ITEM** button at the bottom left to begin defining supporting work. The page for adding the supporting work information has similar fields to those of the page for adding a conflict. Enter at least all the required fields and then use one of the buttons at the bottom to finish. The **ADD ATTACHER/RIDER** button saves the entered information as the primary utility facility, then opens the Add Attacher page to input the attacher information. **ADD ANOTHER SUPPORTING WORK ITEM** saves the entered information as a new item, then remains on the same page to input another item. The **SAVE** button adds the entered information as a new item and returns to the Supporting Work Items overview page.

Return to this overview page at any time through the **Supporting Work** tab of the Project Page. A table displays all the supporting work items that have been created for the project along with their location and type information. The **Edit** text link allows for editing these characteristics, and the **Remove** text link deletes that supporting work item.

The Owner ID column of the table pertains to attachers, correlating to the Work Item ID of the facility to which it is attached.

To add a new attacher/rider to a facility already existing in the supporting work items, click the **Edit** text link on the row of the primary facility owner. On the **Edit Supporting Work Item** page, go directly to the **ADD ATTACHER/RIDER** button at the bottom. Enter the information for the attacher and save its details to finish.
Resolving Conflicts and Supporting Work

To enter a resolution for a conflict or supporting work item, go to Manage Project > Resolve Conflicts > Resolutions & Work Units. The same page can also be accessed from the Conflict Management screen: after reviewing the conflicts in the matrix, click the Go To Conflict Resolutions link on the right side above the headers.

The Resolutions and Work Units page has three tabs: Resolutions, Work Units, and Construction Details.

The recommended course of action is to enter all the resolutions first before moving on to the Work Units, then to complete the Construction Details last following the Work Units.

In the Resolutions tab is the Conflict Resolutions section, under which is the Resolution List. If you are a PennDOT user or a consultant for PennDOT, you may resolve conflicts "on behalf of" a utility. If so, you will first select the utility from the dropdown list titled "Utility - Utility Type" at the top.
Utility users or their consultants will only see their Utility - Utility Type at the top. They will not see the dropdown list.

URMS will show how many conflicts need to be resolved for the chosen utility under the Resolutions List heading. To begin resolving the conflicts, click the Add Resolution button at the bottom.

On the Add Resolutions page that shows, click the Select Conflict button below the Conflicts to Resolve table. A modal window will list the conflicts created for the utility for that project. Conflicts that do not yet have a resolution display a red broken link icon.

Select a one or more conflicts using the checkbox to the left of the Conflict ID, then click the SAVE button at the bottom right corner. The selected conflict(s) are now added to the Conflicts to Resolve table.

Continue down the page to the Resolution Details section of the Add Resolutions page. Choose a Scope of Work from dropdown list of options. The Resolution Type field populates automatically based on the conflict type and the Scope of Work. In the Activities box, select all actions that will need to be taken to resolve the conflict at the project site.

If the relocation requires a unique activity that is not in the list, press the + ADD CUSTOM ACTIVITY button. In the modal window, choose a name that adequately describes the activity. For the Inherit Location From dropdown, choose where the activity will take place: at the original conflict or at the location of the resolution.

Move down the page to the New Location Details section and fill in the fields. As you enter data, other data fields will become active or inactive, as appropriate. Active fields show as white, while inactive fields are gray.
After completing the data entry, two save options are available: SAVE and + ADD ANOTHER RESOLUTION. SAVE will save the entry and return to the Conflict Resolutions screen, while + ADD ANOTHER will save the entry and navigate to the Add Resolutions screen.

Temporary Resolutions
URMS allows for the use of resolutions that involve temporary adjustments to utility facilities. The type of temporary resolution varies by utility type, but all can be identified by the word “temporary” in the Scope of Work and Resolution Type. In addition, the activities associated with temporary resolutions all include the word “Temp.” This allows the temporary activities to be identified when creating Work Units.

URMS also accommodates relocations that involve multiple temporary relocations. Adding an additional temporary location to the resolution is done using the + ADD ANOTHER TEMP LOCATION button and filling in the data for the additional temporary location.

After the temporary location or locations are input, the system requires location data for the final, permanent location of the facility.

Resolutions for Attachers and Riders
Attacher and Rider conflicts can be resolved in one of two ways. The utility can design their own relocation and enter the details of that resolution in URMS. If they prefer to continue in their status as a pole attacher or rider, they can follow the resolution of the parent conflict.
If the utility decides to follow the owner’s resolution, they must first select a **Scope of Work** and **Resolution Type** that matches the owner. Once the Scope of Work and Resolution Type match, URMS displays a checkbox for **Follow Owner**.

Choosing to follow the owner pre-populates the resolution details in the resolution. If there are multiple parent resolutions with the same Scope of Work and Resolution Type, the **CHOOSE RESOLUTION TO FOLLOW** button allows the attacher/ rider utility to specify which resolution will be followed and copy the appropriate resolution data.

If the utility does not follow the owner's resolution, there may be additional fields to complete manually in a section below, depending on the type of resolution chosen.

In either case, be sure to save the new resolution by pressing the **SAVE** button or the **+ ADD ANOTHER RESOLUTION** button at the bottom right of the page.

**Work Units**

After you have resolved the conflicts, the next step is to organize the activities associated with all the resolutions into Work Units. Access this area from **Manage Project > Resolve Conflicts > Resolutions & Work Units > Work Units tab**. The activities can be organized into any number of work units, but several factors should guide the activities to include in a work unit:

- Include all activities that will be performed immediately one after another.
- Include the activities in a way that allows an accurate estimate of the work duration.
- Do not combine activities that will be separated by work that the highway contractor or that another utility must perform.
- Do not combine incorporated and non-incorporated work.

At the bottom left of the Work Units section, click the **+ ADD WORK UNIT** button to open the screen to Add Logical Work Units. Start developing the work unit by choosing activities to include in the work unit with the **+ ADD ACTIVITY** button.

Next fill in the fields in the Work Unit Details section just below the activities. The Work Unit Name, Work Type, and Work duration are required.

If the Work Type chosen is Coordinated, then the **PennDOT Contractor Operations** field becomes active. Checkmark one or more activities that must be performed by the PennDOT highway contractor before the activities in the Work Unit can begin.

Lastly, optionally add any conditional restrictions at the bottom of the page. To choose from the options already saved in the system, use the **+ ADD RESTRICTION** button. This opens a modal window from which one or multiple restrictions may be selected. Alternatively, to include a different conditional restriction that only applies to this project, type a description in the large text box.

With the activities selected, work unit details entered, and any restrictions added, click **SAVE** at the bottom right corner of the page to finish adding the work unit.
Each work unit that has been created will show in the Work Units tab of the Resolutions and Work Units page. Continue adding work units with the + ADD WORK UNIT button until all steps of the facility’s relocation are met.

Construction Details

The final tab of the Resolutions and Work Units page is for the Project Construction Details.

Input numbers for the days of Schedule Lead Time and days of Material Lead Time in the entry boxes in the top section. These lead times are for the entire relocation, not just one portion of it.

The next section below is for conditional restrictions for the project, if there are any. Click the + ADD RESTRICTION button to open a modal window with pre-made restrictions to choose from or type the conditional restriction into the text box beside it. Following the conditional restrictions, optionally
include PATA documents with the **ADD PATA DOCUMENTS** button, which also opens a window in which one or multiple options can be selected.

![Add PATA Documents](image)

Just below the PATA Documents section is a large entry box for typing in any helpful Construction Detail Comments. After writing a comment, be sure to click the **ADD CONSTRUCTION DETAIL COMMENT** button at the bottom right of the box to save the entry.

The final section on the Construction Details screen is for uploading any supporting documents. Following the standard upload function, this space allows the user to drag-and-drop in a file or to use the button to select a file from the computer's folders to upload. A Document Type must be chosen for any file that is added.

![Select Files to Upload](image)

With all sections considered and completed, press the **SUBMIT** button at the bottom right corner to finish. The user can also press **SAVE** at any time to save any progress or edits in the system. Saving the details without submitting will put the resolutions in Draft status, and they will still need to be submitted for the project to continue in the system. Choosing to Submit the resolution with all required fields completed places it in Submitted status, awaiting review by the PennDOT District. URMS moves to the Review Utility Resolutions and Work Units screen, where the utility is now shown along with its status, some of its resolution details, and indicators for the approval and acceleration.
Review Resolutions, Work Units, and Construction Details

Once the utility finishes entering the resolutions, work units, and construction details for the project, the Conflict Coordinator must review and approve them.

View the Review Utility Resolutions and Work Units page through Manage Project > Resolve Conflicts > Review Utility Resolutions. The page displays a table which has a row for each utility that submitted resolutions. The utility name is given along with the review status, the lead times, work duration, number of work units, and action buttons. To perform the review of the resolution or to view its details again, click the Review link in Actions column of the table.

The Resolutions and Work Units page will open and show the list of resolutions entered by the utility. Alternatively, select a different utility from the dropdown list at the top of the Conflict Resolutions section.

Read the line just below the title "Resolution List" to verify that all conflicts and supporting work items have been resolved.

Go to the Work Units tab near the top left of the page. The Work Units screen shows a box for each work unit created by the utility. Each has a name in the gray bar at the top that it was given. At the far-right side of the same gray bar are the buttons to Edit the work unit and Remove Work Unit.

A checkbox for Review Completed is found at the bottom right of the work unit details. This checkbox is for the reviewer's convenience, to mark off each of the work units as they go along in reviewing them. The reviewer can also record their progress, leave the screen in URMS, and return later and see which work units have already been reviewed.

After finishing with the work units, go to the Construction Details tab of the Resolutions and Work Units page. Review the lead times entered by the utility, as well as any conditional restrictions, PATA documents, and other supporting documents.

After reviewing the Resolutions, Work Units, and Construction details tabs, the buttons across the very bottom right of the page can complete the review. CANCEL will void any new information that was added and will return to the Project Information screen. SAVE stores the new information and remains on the current screen to keep working. Click APPROVE if all the resolution information is complete and
accurate. The status shown in the top right corner of the Work Units and Construction Details screens will be changed from "Draft" to "Approved." The approved status for the utility can also be seen on the Review Utility Resolutions and Work Units page.

If the reviewer believes the information provided for the resolution, work units, or construction details is insufficient, use RETURN FOR MORE INFO to return the task to the utility. This button brings up a modal window prompting for a reason for the return, which is required. Then URMS sends an email notification to the person who submitted the resolutions.

Private Right-of-Way

While entering resolutions for conflicts in the system, a utility may indicate that private right-of-way must be obtained. URMS keeps a record of the right-of-way needed and provides a section to update the private right-of-way status.

Go to the Private Row screen at Manage Project > Resolve Conflicts > Private ROW Status. The Utility Private ROW page has a list of resolutions entered for the project that involve private right-of-way. This list gives the utility and location information for the resolution in each line, and the columns furthest to the right pertain to the ROW status.

To change the status in the Utility Required ROW field, click the Edit text in the Actions column. This button changes the Utility Required ROW field to a selection box on that line. The available options for
the status are Required/Must be Obtained and Acquired. To save the change, click Save in the Actions column, or click Cancel to undo the change.

When the status is set to "Acquired," the ROW Resolved Date populates to the current day's date.

The MARK ALL ACQUIRED button to the bottom right of the list simultaneously changes the Utility Required ROW to "Acquired" for all the resolutions on the page.

The status of acquiring ROW can also be updated by the PennDOT Conflict Coordinator during the Generate Clearance process.

**Substitute Right-of-Way**

When a utility has Real Property Interest and needs to relocate a facility, it may request that PennDOT acquire substitute right-of-way for the relocated facility. Follow the process below to request substitute right-of-way and review that request.

**Request Substitute Right-of-Way**

The Utility Design Coordinator can submit a request for substitute right-of-way for their facility. From the Project Page go to Manage Project > Relocation Forms & Requests > Substitute ROW, which pulls up the Substitute ROW Requests List screen. Press the + ADD SUBSTITUTE ROW REQUEST button to begin a new request.

The first step of the Substitute ROW Request form is to select the conflict(s) associated with the request. The + ADD CONFLICT button opens a list of the utility's conflicts in the project that can be chosen. URMS will only display the conflicts with the value "Potential" for the Substitute ROW field in the Utility Conflict Matrix. Conflicts with "Yes" or "No" in the Substitute ROW field will not appear as options. Furthermore, if none of the utility's conflicts was designated with potential for substitute ROW, the Utility Design Coordinator cannot submit a substitute right-of-way request.

To select one or more conflicts for which to request substitute right-of-way, use the check box on the left in the Add Conflicts modal window and click the SAVE button to close the window.
The selected conflict is now listed in the table of Conflicts Associated with this Request. Use the **Edit** or the **Remove** text buttons in the Actions column to revise the selection.

Next, scroll down to the documents section of the page. Here the user has the option to upload relevant files to accompany the request. At this stage of the request, the typical document to upload is a Substitute R/W Plan, however a Utility Description of Rights can also be uploaded here.

If the request form is complete, use the **SUBMIT** button to finish. The conflict will now show in "Submitted" status on the Substitute ROW Requests List.

URMS provides an informational warning that an RPI Request must be submitted for each conflict added to the request. RPI requests must be submitted through the [Real Property Interest Request](#) process.

**Review Substitute Right-of-Way Request**

When a substitute right-of-way request has been submitted by a utility, the District Conflict Coordinator then conducts the initial review. Find the new request in the Upcoming Tasks on the Dashboard or in the Substitute ROW Requests Lists at Manage Project > Relocation Forms & Requests > Substitute ROW from the Project Page.

Notice that the conflict ID in the list row is blue, clickable text—this opens a modal window providing the conflict's utility, location, facility, and RPI information, optional to read over before the review.

To begin the review of the substitute ROW request itself, click the **Review** text in the Actions column. The Substitute ROW Request page now appears, on which the utility user entered the request information. Review the details of the conflict(s) added in the table of Conflicts Associated with this Request as well as any documents uploaded in the lower section of the page.

A red warning box displays below the table if an RPI determination has not been completed yet in the system. The District can still complete the Substitute ROW review while this is the case, but the request
cannot be fully approved by Central Office until the RPI determination is processed through every step in URMS. If the user would like to look further into the project’s RPI details, the link to Go To RPI List Page provides quick access, located under the conflicts table to the right.

Complete the District review with either the APPROVE button or the RETURN FOR MORE INFO button at the bottom right of the page. Returning requires a reason typed into the modal window before sending the request back into the utility's hands to edit it. Approving will move the request into the status "Pending CO Review."

For the Central Office review, the CO Agreement Coordinator can navigate to the request through the task in the Upcoming Tasks on the Dashboard or through Manage Project > Relocation Forms & Requests > Substitute ROW from the Project Page. Find the request in the list with the status "Pending CO Review" and click the Review text in the Actions column.

On the subsequent Substitute ROW Request page, follow the same track as the District of checking the conflict details in the table of Conflicts Associated with this Request and opening any documents that were uploaded in the Substitute ROW Documents sections below.

When there is a red warning box stating "one or more conflicts have an RPI without a determination," the APPROVE button at the bottom of the page is grayed out. The related RPI request submission and determination must be completed before this substitute right-of-way request can be approved.

Finish the review of the Substitute ROW Request page using the APPROVE button or the RETURN FOR MORE INFO button at the very bottom right. Choosing to return the request requires a reason entered in a modal window, and then it will be sent back to the utility. The utility can make the required changes and submit the request again, which will go to the District for review first.

Otherwise, if the review confirmed that everything is in order, approving the request completes the substitute ROW process in URMS, and the request shows in "Approved" status in the Substitute ROW Requests List.
Cost Share

Cost Share is a reimbursement program for utilities that are public entities and for private companies of certain utility types. Eligibility is prescribed by state law and detailed in DM-5. URMS will only allow eligible utilities to apply for Cost Share.

Build Cost Share Offer

The Cost Share process is begun by the PennDOT Utility Unit by building a cost share offer. This is done on the Cost Share Process List page at Manage Project > RPI, Agreements & Invoicing > Cost Share. Below the table, use the + ADD NEW COST SHARE button to start building a new offer.

The Build Cost Share Offer page opens with the Cost Share Offer tab in view. Select the Utility and its Utility Type from the dropdown boxes at the top. Once these Utility Information items have been selected, any Cost Share Percentage options appear in the next section down.

To the upper-right of the Cost Share Percentages is the linked text to View Project Funding. This button opens a modal window on the same page on which the user can easily reference utility funding information from MPMS.

Choose the cost share options to present to the utility and check their checkboxes. Incentivized cost share options (those with greater than 50% reimbursement) may require accelerated dates for resolving the conflicts. Accelerated dates should meet the requirements in DM-5. Enter these dates in the Resolve Conflicts Due column of the table. Note that the current conflict resolution date is given at the upper-right of the table, above the View Project Funding link. An accelerated date is indicated in the table by a speedometer icon next to the date or input box.

For any of the cost share percentage line items that have prior work, fill in an accelerated date for that work in the Prior Date column.
PennDOT may override the typical percentage options and offer a cost share to the utility that is greater than the typical amounts. For the case of an override, use the input boxes under Override Percentage. Otherwise, skip this section and continue downward. If any cost share documents exist already, upload those in the documents section.

At the bottom of the page, press the SAVE button to save any progress while continuing to edit the form. If all the cost share information is prepared, press one of the buttons to the right. When the selected utility is a business partner in URMS, the SEND OFFER TO UTILITY button is active, which sends the offer as a task in the system to the utility company’s Utility Design Coordinator for them to review. For a utility that is not a business partner, the GENERATE/SEND COST SHARE OFFER LETTER is active, which creates a cost share letter that is attached to a notification email sent to the utility contact.

Completing the Build Cost Share Offer form brings the user back to the Cost Share Process List, where the new offer shows in the table in "Pending Utility Review status." If needed, the Rescind button in the Actions column may be used to rescind a pending offer.

Utility Upload Signed Cost Share Request

Once the PennDOT District has sent a cost share offer, the Utility Design Coordinator reviews it and generates the Cost Share Offer Letter.

Find the offer through a task in the Upcoming Tasks list or through the Project Page and navigate to Manage Project > RPI, Agreements & Invoicing > Cost Share.
On the Generate Cost Share Offer page, the section of Cost Share Percentages lists the options that PennDOT has chosen to propose to the utility. These may include a standard 50% cost share offer as well as alternative options that depend on the utility fulfilling accelerated deadlines. In this case, accelerated deadlines are stated in the "Resolve conflicts due" column and are indicated by speedometer icons.

Choose one of the options by clicking the radio button on the left. Then move to the action buttons at the bottom of the page.

The **SAVE** button saves the selection but does not finish the utility review. **DECLINE** completely declines the cost share offer and removes it from the utility's view. Finally, the **GENERATE/SEND COST SHARE OFFER LETTER** button creates a draft cost share letter document that appears as an uploaded file in the section for Cost Share Offer Documents.

Now that the draft cost share letter has been generated, the next step is for the utility to print and sign the letter and then upload the signed cost share letter.

View the letter that was generated by clicking on the blue File Name in the uploaded documents list, which downloads the document to the computer. Find the downloaded file and open it to review.

Next, print the document in order to obtain the required signatures from the utility company representatives at the end of the letter.
Return to the same place in URMS through the task in the Upcoming Tasks or through Manage Project > RPI, Agreements & Invoicing > Cost Share. Upload a scan of the signed cost share offer letter at the bottom section of the page and select the Document Type. Lastly, press SUBMIT in the lower right corner.

Look for a green bar across the top of the page confirming the submission was completed successfully. Now the cost share request is pending review by PennDOT's Central Office.

Central Office Review of Cost Share

The final stage of the cost share process is approval by Central Office, consisting of a review by the Agreement Coordinator along with a review by the Section Chief.

The CO Agreement Coordinator can navigate to the utility's submitted cost share request through the task item in the Upcoming Tasks. Alternatively, go to Manage Project > RPI, Agreements & Invoicing > Cost Share from the Project Page, then click Review in the Actions column on the Cost Share Process List.

The Build Cost Share Offer page shows the details of the potential cost share. Verify the information in the Cost Share Percentages Section, then go to the Cost Share Offer Documents and click the blue File Name of the Signed Cost Share Offer Document. This downloads the utility's signed request letter, which the CO Agreement Coordinator can open and review before giving approval.

Optionally upload any additional relevant documents in the upload section at the bottom of the page. When adding a file, select the Document Type of Cost Share exception approval, Misc. Cost Share doc, or even a Signed Cost Share Offer.

In the lower right corner of the page, press the CONTINUE button to move on to the Review Cost Share tab of the Build Cost Share offer screen.

This review tab provides a space for Central Office to type any comments regarding the cost share. Be sure to press the ADD COST SHARE COMMENT button below the input box to save an entry, which will later show in the Previous Comments box further down.
To complete the review, click the **APPROVE** button at the bottom to approve the cost share request and pass it on to the Section Chief, or click **RETURN FOR MORE INFO** to send it back to the utility for revision and resubmission. Choosing to return the request requires a reason to be typed into a modal window to explain the response to the utility.

A cost share that was approved by the CO Agreement Coordinator is in "Pending CO Section Chief Review" status until the final approval.

The CO Section Chief follows the same steps as the Agreement Coordinator to review the cost share request and give final approval or return for more information. On the Review Cost Share tab, check the **Previous Comments** box to see any notes from the Agreement Coordinator.

When the CO Section Chief clicks to approve the request, the cost share process is complete in URMS, and it shows in "Approved" status on the Cost Share Process List page.

**Revoke or Recover a Cost Share**

If the utility fails to meet a condition of an incentivized cost share offer, the offer can be revoked by the District in URMS. After the offer has been built, agreed to by the utility, and reviewed by Central Office such that it reaches "Approved" status, the District can return to it on the Cost Share Process List at **Manage Project > RPI, Agreements & Invoicing > Cost Share**.

Click the **Review** text button in the Actions column of the list to open the page with all the information used to build the offer and the documents added during the cost share process. At the very bottom right of the page is the **REVOKE** button. Pressing this button opens a modal window into which a reason for the revocation must be entered. Then, clicking **REVOKE** returns the user to the Cost Share Process List, where it shows that the offer is in "Revoked" status. The revoked status creates a 0% cost share for the utility, following the current policy.

If the conditions allow for the utility to amend the requirement that was missed, PennDOT can also recover a cost share offer that has been revoked. Recovery is done through the same process as revocation: find the offer on the Cost Share Process List page and click **Review**. Then go to the bottom of the page and choose the **RECOVER** button. The cost share will be changed from the 0% disincentive value to 25%, following current policy for recovery percentage. Back on the Cost Share Process List, the offer will be seen in "Recovered" status.

**Real Property Interest (RPI) Request**

As a utility resolves its conflicts, it may enter Real Property Interest information for any relevant conflicts. The RPI information may be in support of a substitute ROW request or a reimbursement agreement.
Submit RPI Request

Before beginning the request process, gather relevant RPI information, such as easement agreements, affidavits, or deeds. In general, RPI information should be submitted one conflict at a time. However, URMS does accommodate multiple situations as shown in Table 5.

Table 5 - Real Property Interest Documentation in URMS

<table>
<thead>
<tr>
<th>Number of Conflicts</th>
<th>Number of RPI Documents</th>
<th>Example Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Conflict</td>
<td>One RPI Document</td>
<td>A single utility pole conflict on a single parcel of land.</td>
</tr>
<tr>
<td>One Conflict</td>
<td>Multiple RPI Documents</td>
<td>A linear pipe conflict that spans multiple properties, each property with a separate easement.</td>
</tr>
<tr>
<td>Multiple Conflicts</td>
<td>One RPI Document</td>
<td>Multiple pole conflicts all located on one parcel of land with one easement agreement.</td>
</tr>
<tr>
<td>Multiple Conflicts</td>
<td>Multiple RPI Documents</td>
<td>URMS does not accommodate this situation. RPI should be submitted one conflict at a time.</td>
</tr>
</tbody>
</table>

The Utility Design Coordinator can go to Manage Project > RPI, Agreements & Invoicing > Real Property Interest to upload a new request. The Utility RPI Requests List page contains a table listing all requests by the utility for that project. Below it, click the + ADD NEW REQUEST button. This will open the Real Property Interest (RPI) Review Request page.

![Utility RPI Requests List](image)

Note the status of the request at the top right of the page, just below the title heading. A new request being entered will be in "Draft" status, as will an existing request that has been started and saved but not submitted.
First, select the utility from the dropdown box at the top. Then continue to the next section for associated conflicts. Click the + ADD CONFLICT button to open a modal window and select a relevant conflict from the list of those that have been created in the project for the utility. Select SAVE to add any selected conflicts to the RPI request or click CANCEL to close the window without adding any. At least one conflict must be selected to submit the request.

In the same section of the page, select the checkbox(es) for the Instrument Type. At least one selection in this field is required as well. Use the last section of the screen to upload any supporting documents. Once all the request information is complete, use the SUBMIT button at the bottom right corner to finish.

Once it has been submitted, the request now shows on the Utility RPI Requests List screen, and the Status field indicates that it is "Pending District Review."

The information for an RPI request cannot be changed by the utility following submission. To see the details of an existing request record in the Utility RPI Requests List, select the View link in the last column of the table. The Real Property Interest (RPI) Review Request page opens again, but any edits made will not be saved. The SAVE and SUBMIT buttons at the bottom of the page are grayed out, and the user can only CANCEL.

PennDOT’s RPI review process is in the Review Real Property Interest section below.

Review Real Property Interest

The PennDOT District utility unit, Central Office utility unit, and Office of Chief Counsel must review an RPI request for it to be fully approved.

First, the DURA reviews the submitted request by going to the same page on which it was submitted, at Manage Project > RPI, Agreements & Invoicing > Real Property Interest. Find the new request in the list and click Review in the Actions column to open the Real Property Interest (RPI) Review Request on which the utility entered the required information. The status at the top right of the page section should read Pending District Review.
Review the conflicts and the Instrument Type and open any attached documents by clicking on the File Names to download them. Use the Utility RPI Request Comments text box and the ADD RPI COMMENT button to publish notes to the request that will be visible to any user. Existing comments are seen in the box just below it for Previous RPI Comments External.

The last section of the page allows the reviewer to upload additional documents as well. When the review is finished, go to the bottom right corner and click APPROVE to approve the RPI request or RETURN FOR MORE INFO to return the request to the utility to make necessary changes. Choosing to return it requires a reason to be typed into a modal window that appears, and then URMS sends an email notification to the person that submitted the RPI request.

An RPI request approved by the District goes to PennDOT's Central Office for review. The status on the Utility RPI Requests List now indicates "Pending CO Review."

As a CO user, go to the Utility RPI Requests List page and click the Review action in the row for the request that is pending CO review. On the resulting Real Property Interest (RPI) Review Request page, examine the conflicts, Instrument Type, and previous comments and open any attached documents by
clicking on the File Names to download them. The middle of the page has the **CO & OCC RPI Comments** text box and the **ADD RPI COMMENT** button to add new notes to the previous comments.

At the bottom right corner, click **APPROVE** to approve the request and send it on to the Office of Chief Counsel or click **RETURN FOR MORE INFO** to send the request back to the District. Returning the RPI request from Central Office also requires a reason typed into the modal window that appears, which will explain to the District why the request cannot be approved yet.

The request then has the status of "Return to District" in the Utility RPI Requests List. The District user must review the RPI request again and ensure the stated requirements are met. If the District must return the request to the utility, the District will again have to approve the updated request before it continues back to Central Office.

An RPI request approved by the CO user displays in the Utility RPI Requests List with the status "Pending OCC Review." An OCC user must find the request at **Manage Project > RPI, Agreements & Invoicing > Real Property Interest** and take the same steps to review, comment, and approve or return it. There is an additional field of **Overall Determination** on the page **Real Property Interest (RPI) Review Request**, by which OCC selects the awarded compensation—Compensable, Compensable in part, or Non-Compensable.

When the Office of Chief Counsel gives the overall determination and approves the RPI request, the request enters the status "Pending CO Determination Review." The Central Office user sees the request in the Utility RPI Requests List where the **Determination** field now has a value telling what OCC determined. Click the **Review** action text once more to view the request details and analyze its contents. At this stage, the button to **RETURN FOR MORE INFO** is grayed out, and the only options at the bottom corner of the page are to **CANCEL** viewing, **SAVE** an edit, or **APPROVE** the request.

The last step is the "District Determination Review." As the District user, review the request again, add any final notes in the comments box, and click **APPROVE** at the bottom to confirm the RPI. Following this action, the request shows on the Utility RPI Requests List page with the status of "Complete."

**Preliminary Estimate and Documents**

When a utility is entitled to reimbursement for relocation costs, an estimate of the relocation costs is required for PennDOT to draft a reimbursement agreement.

**Create Preliminary Estimate**

The utility user begins the process of creating the estimate package. As the Utility Design Coordinator, select **Manage Project > RPI, Agreements & Invoicing > Preliminary Estimate**. The system navigates to the **Utility Estimate Forms List** page.
Click the + ADD NEW ESTIMATE FORM button to open the Utility Estimate Form. This page has two tabs: Preliminary Estimate and Contracts. Complete the Preliminary Estimate first to make the Contracts tab available.

Fill in the fields in the gray box at the top. If you are a utility user, the Utility - Utility Type box will be prefilled. PennDOT users will choose the Utility - Utility Type from the dropdown selection. PennDOT users can enter the Agreement Number below the gray box based on the District’s numbering scheme.

Costs for the various portions of the project may be entered in the form fields. The text boxes in the column on the right side require dollar value inputs. Each lettered section of the form has a subtotal that calculates as the values are entered.

Select the Reimbursement Type by using the checkboxes next to Cost Share and RPI(s). Depending on the checkboxes used, the form will show or hide the appropriate fields, allowing the system to calculate an estimated reimbursement.

If RPI is chosen, select the Proration Type of Facility Count or Facility Length. Facility Count is used for single location conflicts, such as utility poles. Facility Length is generally used for underground conflicts where the conflict is not a single location, but instead has a length. If the utility has both types of conflicts, the work must be subdivided divided and two estimates are required, one for each type of proration.

When cost share is selected, an approved Cost Share Request Document will be required for PennDOT to approve the estimate. Cost share documents can be uploaded for review at the bottom section of Contracts tab.

Click the SAVE button at the bottom at any time to save the progress. After all the available input boxes are filled, use the CONTINUE > button to finish the Preliminary Estimate and begin the Contracts tab.

If the utility is using contractors for any portion of the work, the Contract Detail page contains multiple sections of lists to which the user must add appropriate entries, including continuing contracts, invitations to bid, and contractors hired without competitive bid. Click + ADD CONTRACTOR under any
of those sections to open a new row in that section’s list. A selection box appears in the Estimate Item column, from which one of the following options must be chosen:

- Preliminary Engineering
- Right of Way Acquisition
- Temporary Construction
- Permanent Construction
- Removal Costs

An entry box also appears next to it in which to type the Contractor Name. Click Save in the Actions column to the right to add the new item to section.

The Contract Detail also includes a section for Uploading Supporting Documents. A document type must be specified from the options below:

- Cost Share Justification
- Cost Share Request Letter
- Cost Share Resolution
- Incorporated Item List
- Incorporated Work Request Letter
- List of Material and Material Cost to be Installed
- List of Material to be Removed
- Supplemental Estimate

The last item on the page is a checkbox to confirm the District has completed its review and has secured all necessary District approvals required for the Department to consider the subject Cost Share Request.

Use the SUBMIT button at the bottom to submit the estimate form after all relevant information has been inputted. URMS returns to the Utility Estimate Forms List, where a record for the submitted form shows with a status "Pending District Review."

PennDOT’s Preliminary Estimate review process is in the Review Preliminary Estimate section below.

Review Preliminary Estimate

A District user may access and review the Preliminary Estimate form on the Utility Estimate Forms List page at Manage Project > RPI, Agreements & Invoicing > Preliminary Estimate. Click the Review text in the Actions column to the open the form to the Preliminary Estimate page.

At the top right of the Preliminary Estimate section, the button to PREVIEW DOCUMENT is now active. Click the button to download a PDF listing all the information from the page.
Review the entries for the preliminary estimate, then click on the Contracts tab or the CONTINUE button to move on to the next page. The District user can also make edits and SAVE the changes on either tab. Review the items entered for the Contract Detail and hit APPROVE at the bottom. This approval puts the estimate form into "Pending CO Review" status.

Following the District approval, the Central Office user finds the pending estimate in the Utility Estimate Forms List. Click the Review action text in the far-right column to begin.

Just as the District, CO will review the entries on the Preliminary Estimate page and then select the CONTINUE button at the bottom to move on to the Contracts page. Information on either page can be edited and saved with the SAVE button at the bottom. The Preliminary Estimate page also again provides the PREVIEW DOCUMENT button at the top right, above the status, to download and view the preliminary estimate as a PDF with the PennDOT letterhead.

When the review of all the entries, selections, and any supporting documents is finished, click the APPROVE button at the bottom right of the screen to approve the utility estimate form. If the estimate includes a Cost Share, the system will check to confirm that there is an approved Cost Share Request upon clicking the APPROVE button. If an approved Cost Share Request is missing, the system will not approve the Preliminary Estimate and will display an error message. Cost share documents can be uploaded for review at the bottom section of Contracts tab.

An approved Cost Share Offer is required for this Utility Estimate form.

If approved, the status of the form then shows as "Complete" on the Utility Estimate Forms List page. A user can still select the Review action to see the details of the form, but no changes can be saved.

Alternatively, if CO decides to RETURN FOR MORE INFO, the form is passed back to the District. A modal window prompts for a reason for the return, which will explain the case to the District. Likewise, if the District returns it for more info, the form is returned to the utility, and a reason is required to be given.
Project Status 5 - Contract Development

Generate Clearance (D-419 or Standard Special Provision)

Before creating the clearance for a utility on the project, all prerequisite needs should be accounted for in URMS. The Project Checklist can be helpful to identify any outstanding requirements. Checking for Actual Dates on the Project Milestones page can also confirm if all prior steps are complete.

Update Private Right-of-Way Status

Another part of starting the clearance process is ensuring any private right-of-way needed for the project has been acquired. As the Conflict Coordinator, first go to Manage Project > Utility Clearance > Utility Clearance. On the resulting page, check the tabs at the top left to see if a tab for Utility Private ROW exists.

Go to the Utility Private ROW tab and check for "Acquired" in the column Utility Required ROW. If the field is empty, click Edit in the Actions column to open a dropdown selection box in the Utility Required ROW field. Use this box to change the status of the right-of-way acquisition, then click Save. If the ROW has been acquired for all the resolutions listed, use the MARK ALL ACQUIRED button at the bottom right of the table to easily update them all. The Conflict Coordinator can also click the text to View Resolution in the Actions column, which will navigate to the Edit Resolutions page.

Create PennDOT Work Buckets

The Conflict Coordinator organizes and allocates the work units created by the utilities by placing them into "Work Buckets." Work buckets are a way to organize the work into meaningful groupings. These work buckets are then used to organize the content of the D-419 and in this way become part of the clearance documentation. Work buckets can be used in any way that works best for the project, but a few good options are to create a bucket for each utility type or, at least, one for underground and one for aerial utilities.
The **Project Work Summary** section provides the space for the work buckets. Begin by clicking the button **+ ADD PENNDOT WORK BUCKET**. On the Manage Work Bucket page, enter a name for the new work button. Then click the button to **+ ADD UTILITY WORK UNIT**. A modal window opens with a list of the work units created by the utilities. Use the checkboxes on the left side to select whichever work units belong in the current work bucket, then **SAVE** and close the window.

The chosen work units are then listed on the Manage Work Bucket page, each within its own box displaying its details. If relevant, click a work unit's **Dependency** dropdown entry box and select any dependencies existing for that work unit. The order of the work units can be re-arranged by editing the numbers in the **Sequence** field boxes and selecting the **Reorder** text button near the lower left corner of the section. Alternatively, reorder the work units by clicking and holding anywhere in one of the unit boxes and dragging it up or down.

When the work bucket setup is finished, click the **SAVE** button at the very bottom right of the page to return to the Utility Clearance page with the new work bucket now found in the Project Work Summary section.

To delete a work bucket that has been added, use the **Remove Work Bucket** text button on the right side of the box.

Continue adding work buckets to account for all the work units of the relocation project. As with configuring the work units within a bucket, the work buckets can also have a **Dependency** assigned to
them, and the **Sequence** of the buckets can be changed. The designation of the work units and the ordering of the work buckets are important because of their effect on the D-419 document.

**Submit the Utility Clearance**

When ready to generate the clearance, the District Conflict Coordinator can begin by selecting the task in the Upcoming Tasks on the Dashboard or by navigating to **Manage Project > Utility Clearance > Utility Clearance** from the Project Page.

If this is a local project, it will be indicated at the top left corner with the text, "This is a Local Project." Additionally, on the same line will be a box for the PennDOT user to enter the name of the **Local Sponsor**. Local projects also have an extra requirement at the bottom of the page to confirm the user is authorized to enter the information on behalf of the sponsor. All other projects do not have these additional fields.

Select a **Clearance Type** from the dropdown entry box. D419 is the first option, but Standard Special Provisions are also listed.

If the clearance is not yet final, a **Conditional** clearance can be generated by using the Conditional checkbox to the right of the Clearance Type.

The **PREVIEW CLEARANCE** button near the top right of the section allows the user to see a sample of the document without saving it to the project files. A PDF file downloads to the computer, which reflects how the actual clearance will appear, except that the preview document has a "PREVIEW" watermark.
Review the preview clearance, then move to the buttons at the bottom of the page. **SAVE** stores the current progress on the Utility Clearance page but does not advance further. **GENERATE WORK SUMMARY** makes a work summary document for each utility on the project, if the utility's resolutions, work units, and construction details have been approved and all the milestones leading up to clearance have been completed. These summary files are then stored in the Project Documents.

**SUBMIT** forwards the clearance information to Central Office and creates a task for the CO Agreement Coordinator to review it. If it receives approval, the clearance document will be completed and added to the Clearance Documents section as well as the Project Documents screen.

Review the Clearance

When the District submits a clearance request for the project, the CO Agreement Coordinator receives a task to review it. If the clearance was created by a consultant user, the review has an additional step of approval by the Utility Unit Oversight role prior to Central Office approval. This circumstance is indicated by the status of the clearance, which progresses from "Draft" to "Utility Unit Oversight Review" after the consultant's initial submission. When the Utility Unit Oversight approves, the status becomes "Pending CO Review."

To begin a review, find the task in the My Upcoming Tasks table or go to the Project Page and then Manage Project > Utility Clearance > Utility Clearance.

Once the reviewer is on the Utility Clearance page, the **PREVIEW CLEARANCE** button below the status heading on the right side of the screen provides the information to evaluate. Any additional documents that were uploaded or comments that were typed further down the page are available for consideration as well.

After reviewing the new clearance input to verify its sufficiency, click **APPROVE** to complete the clearance process or **RETURN FOR MORE INFO** to send it back with a comment about why it could not be approved yet. Approving it will create a Utility Clearance document according to the information entered, which is added to the Clearance Documents section of the page as well as the Project Documents.
Updating the Clearance

The District can easily keep utility clearances up-to-date, even when the project is in Construction, by submitting a new clearance. If the project’s let date is in the past, there is no requirement for a Central Office review, simplifying the process.

Design Build Clearance

When a project is designated as Design-Build during Scoping, the Utility Clearance page has a standard special provision ("SSP for Design Build") within the Clearance Type dropdown selection box. The District can generate this clearance right away and create the file in the Project Documents. This clearance will allow the design-build contract to be let.

As the project progresses, ongoing utility coordination should continue in URMS. When all utility coordination is complete, the Conflict Coordinator can generate the clearance again under a different clearance type following the usual procedure. However, this case of a second clearance is only applicable for a project that has passed its let date (the design-build let date). The new document will replace the original on the Utility Clearance screen as well as in the Project Documents, but the original document is still accessible by clicking the Version number of the file and then clicking the File Name in the "View Previous Documents" modal window that opens.

Generate Utility Clearance Certification

The utility clearance certification (UCC) can be created by the CO Agreement Coordinator after Central Office has approved the clearance. To generate the final UCC, look for a task in the Upcoming Tasks list or go to the Project Page and select Manage Project > Utility Clearance > Utility Clearance Certification.

If the District Conflict Coordinator indicated the clearance is conditional during the Generate Utility Clearance process, then the Is Conditional box will be checked, and an additional line below it gives the reason entered for the conditional status. At this point, the CO Agreement Coordinator will only be
creating a conditional UCC; the project will need to be revisited in URMS to generate a final UCC when available.

If the clearance was not marked as conditional, this checkbox is blank and grayed out. In either case, the conditional checkbox cannot be edited; it is only included on this page for reference.

The bottom section of the page has the Status of Project Deliverables, below the buttons for the UCC. Click any of the subsections to expand them for relevant project information.

Central Office can enter a note for the reason for the clearance's conditional status, if necessary. After that, press the GENERATE UCC button below the box.

Look for a green bar across the top of the page confirming the generation was successful. The project now has a UCC document which can be found in the Project Documents.
Utility Agreements

The Conflict Resolution phase in URMS includes the ability to submit all information necessary for PennDOT to produce a reimbursement agreement and/or a private status agreement. The sections below describe how to perform the various parts necessary for the agreements for the project.

PennDOT Uploads Draft Agreement

Once Central Office has approved an estimate for the project, a task is generated for the CO Agreement Coordinator to create a draft reimbursement agreement. No task is created for a private status agreement, but the private status agreement can be created whenever the CO Agreement Coordinator has the information required to draft the document.

The agreement is created outside of URMS and reviewed/approved by PennDOT OCC according to existing procedures. Once the agreement has been drafted and approved, it must be uploaded to URMS.

While viewing the project in URMS, go to Manage Project > RPI, Agreements & Invoicing > Utility Agreements. On the Agreement Document List, press the UPLOAD/REVIEW DOCUMENT button on the lower left of the screen, which opens the Upload Agreement Documents page. Select the utility from the Utility - Utility Type dropdown box.

Next, upload a file for the draft agreement. Once the File Name appears at the bottom of the page, select "Utility Agreement" for the Document Type. Finally, press UPLOAD in the bottom right corner to finish adding the draft agreement.

Utility Returns Signed Agreement

After the unsigned agreement is uploaded by PennDOT, the utility will be notified to sign the agreement. For business partner utilities, a task is generated to upload the signed agreement. For non-business partner utilities, the CO Agreement Coordinator is assigned this task.
The utility should download the document and obtain the signatures from the appropriate officials. Business partner utilities can return a scan of the signed consultant agreement through URMS. Non-business partners must mail an agreement with a wet ink signature back to PennDOT.

When ready to upload a signed agreement, either use the task or navigate to **Manage Project > RPI, Agreements & Invoicing > Utility Agreements**. On the Agreement Document List page, click the **UPLOAD/REVIEW DOCUMENT** button to open the Upload Agreement Documents screen. Press **SELECT FILES TO UPLOAD** or drag and drop a file into the given area.

When the document uploads and the File Name shows below the upload box, select "Signed Utility Agreement" for the **Document Type** and optionally enter a note. Then go to the bottom right corner of the screen and press the **SUBMIT** button to finish.

Look for a green bar across the top of the page confirming the upload was successful. Likewise, the new file will be listed in the first section for existing uploaded agreement documents.

---

**Central Office Obtains Commonwealth Signatures**

After a signed agreement is uploaded, a new task is generated for a PennDOT Central Office user to upload the fully executed agreement. This task is assigned to only one person, but other Central Office users can perform it. District users can view the agreements but cannot change or approve them.

Locate the file in the same location as it was uploaded: on the Project Page, go to **Manage Project > RPI, Agreements & Invoicing > Utility Agreements**.

Download the signed agreement and print the project history to verify that it was uploaded by the utility. Circulate the documents for signatures following existing procedures.
When the fully executed agreement is available, it can be uploaded from the page at **Manage Project > RPI, Agreements & Invoicing > Utility Agreements**. Upload the file using the Executed Utility Agreement document type. Once uploaded, return to the Agreement Document List page and press the **Edit** button to enter the **Agreement Executed Date**, then click **Save**, or click **Cancel** to undo the action.
### Project Status 6 - Pre-Construction

#### Prepare Notice to Proceed and Highway Occupancy Permit

After resolutions have been entered for a utility, the DURA can prepare the notice to proceed (NTP) and a highway occupancy permit (HOP) for it. Go to **Manage Project > Relocation Forms & Requests > HOP/NTPs**. The Utility HOP and NTPs List shows the resolutions created for the project, including the status of their approval and whether an NTP and/or HOP is required for the utility.

The checkmarks indicate that an NTP and/or HOP is required. When you are ready to issue the NTP or HOP, click the **Prepare NTP** or **Prepare HOP** button to finalize and enter conditions. Use the checkbox to indicate that the NTP and/or HOP is ready to be issued and add any conditions related to the NTP and/or HOP in the text box. The conditions are added to the text of the NTP and/or HOP document created by URMS.

If the right-of-way clearance for the facility relocation has not been obtained yet, the user is notified in a red warning message across the bottom of the window. Visit the page at **Manage Project > Resolve Conflicts > Private ROW Status** to resolve this case. See the **Right-of-Way** section of this guide for more information.
Issue Notice to Proceed and Highway Occupancy Permit

When PennDOT is ready to issue an NTP and/or HOP, go to the Project Workflow Notification screen through Manage Project > Workflow Notification. Send all the NTPs and HOPs at once using the large button at the top or use the SEND button to send to individual utilities.

After sending the notifications, look for a green bar across the top of the page confirming they were sent successfully.

When either of these documents have been sent, the Project Checklist page for the project is updated. Click the View text in the box of either item to download its respective PDF file for viewing.
Project Status 7 - Construction

Perform Relocations

Features related to construction activities will be added in future versions of URMS.
Project Status 8 - Closeout

Features related to closeout activities will be added in future versions of URMS.
Assigning PennDOT Users and Consultants to Districts

Assigning PennDOT users to specific Districts helps URMS display the most relevant projects to them on the My Active Projects section. All PennDOT users and consultants must be assigned at least one District.

From the top menu, choose Admin > Assign Districts. The Assign Districts page shows a table list of the users registered in URMS who can be assigned. By default, they are listed alphabetically by last name. For the chosen user, click the ADD DISTRICTS button on the right side of the table row. Then check every desired District in the modal box and click SAVE to close it. The Districts assigned to a user will show in the table under "Assigned Districts."

The columns in the table can be filtered to narrow down the list. Another way to find a user is by typing part of the name in the text box below the "User Name" heading.
Manage Consulting Companies

A PennDOT user can visit the Manage Consulting Companies page by using **Admin > Consulting Companies** from the dropdown options.

The consulting companies are listed in a table that can be filtered for finding a particular one more easily. Use any of the input boxes in the **Filter List** section and press **APPLY FILTERS** to narrow down the results in the section below.

This page provides access to details for each of the consulting companies registered in URMS, including their users in the system and any consultant agreements. View this information by clicking on the blue **Company Name** in the table of results to open the Consulting Company page.

Along the left side are three tabs. The Company Information appears first with the company's address location. The Users tab lists the personnel who registered in URMS along with their contact information. Lastly, the Consultant Agreements tab opens a screen for managing agreements with the selected consulting company.

This Manage Consultant Agreement screen contains an **EXPORT LIST** button to download an Excel spreadsheet file of the data in the table, like how other tables in URMS allow for exporting.

The Consultant Agreements tab also has the button to **ADD CONSULTANT AGREEMENT**, which opens the Add/Edit Consultant Agreement page. This is the same page that opens through the blue **Edit** text button on the line of an existing agreement.

If the user is viewing and editing an existing consultant agreement, the entry fields will already be filled with information. If a new agreement is being added, each of the empty boxes must be completed. The name of a registered company must be entered for the **Utility Name**, which provides selectable autocomplete options that dropdown as the user types. Entering a utility that does not exist in the system, as it does not appear as an option in the autocomplete options, causes the text to be erased so that the user cannot advance.

Fill in the remaining fields at the top and upload a document for the consultant agreement itself, then press the **SUBMIT** button at the very bottom right to finish adding the new agreement for the selected company.
Manage Resolutions and Activities

An internal user can see all resolution options that are available in the system. Hover over the Admin menu heading in the light blue bar across the top of the screen. From the dropdown items, choose Resolutions & Activities.

The items are listed by their Utility Type. Filter the utility types that are shown by clicking the dropdown arrow on the right side of the filter text box then selecting the checkbox for any of the options. To sort the list by either the Scope of Work or the Resolution Type instead of the Utility Type, click the column heading.
The DURA can edit a resolution's fields, while other PennDOT users can only view these details. In either case, access the fields using the Edit text button in the Action field on the right side of the table. This action opens the Resolutions And Activities screen, revealing the many fields specifying the resolution details.

The DURA has buttons on this page for editing the resolution. In the Add Activities section is an Actions column allowing the user to Edit or Remove activities that are currently applied to the resolution. Additionally, + ADD ACTIVITY below the rows of activities lets a new one be created for the resolution. Lastly, the SAVE button at the bottom right of the page will save any edits made.

Other users do not have these options, so any changes to the fields will not be saved.
Manage Conditional Restrictions

A PennDOT user can also manage the conditional restrictions that have been entered for utilities as well as create new ones for use in conflict resolution. The utilities have the option to include these specifications in the resolution activities for conflicts in which their facilities are involved.

Hover over the Admin menu heading in the light blue bar across the top of the screen. From the dropdown items, choose Conditional Restrictions.

The Utility Conditional Restrictions page opens and shows all the conditional restrictions entered for all utilities. These can be implemented when entering Work Units and Construction Details in the conflict resolution phase of a project.

To add a new conditional restriction, press the ADD CONDITIONAL RESTRICTION button below the table at the bottom right of the page. In the modal window that opens, first enter the Utility Name. As the user begins typing the name, a dropdown list appears below the entry box with autofill options of utilities that have been created in the system. An existing utility must be chosen in order to proceed. If the desired utility does not exist in the system yet, then create the utility before adding a restriction.
Next select one or more options for the **Utility Type**, which populate based on the utility specified. Finally, type in a brief description to state what the **Conditional Restriction** is. Then click **SAVE** to close the window and add the new conditional restriction to the list.

The **Actions** column on the right side of the table has the **Edit** text button, which reopens the modal window in which the details can be changed. Remove an existing conditional restriction using the **Delete** action.

![Utility Conditional Restrictions Table]

**Manage Template Signatures**

Template signatures are the names that are applied to documents generated by URMS as signatures for that document. These names and signatures can be edited and updated as needed.

Hover over the **Admin** menu heading in the light blue bar across the top of the screen. From the dropdown items, choose **Template Signatures**.
Central Office users (excluding CO Admin) have an active **EDIT** button on each line to make changes to any of the template signatures. They can also create new entries using the **ADD** button at the bottom of the page beneath the existing entries.

**Manage Parent - Subsidiary Relationships**

URMS has a screen that shows which utilities in the system have been designated as subsidiaries of another utility. To access the Manage Parent Subsidiaries page, hover over the **Admin** menu heading in the light blue bar across the top of the screen and choose **Parent-Subsidiaries** from the dropdown options.

Central Office users (excluding CO Admin) can add a new parent subsidiary. Press the **ADD PARENT SUBSIDIARY** button below the table to open a modal window into which the information for the parent utility and the subsidiary utility can be entered.
Manage Cost Share Percentage

PennDOT users can find a table of all the cost share options that are currently set up for use in URMS processing. Hover over the Admin menu heading in the light blue bar across the top of the screen and choose Cost Share Percentages from the dropdown items.

Central Office users (excluding CO Admin) can Edit and Remove existing cost share percentage options as well as add a new one. Press the ADD COST SHARE PERCENTAGE button below the table to open a modal window into which the information for the cost share option can be entered.

If the cost share is a pilot or temporary, set the Pilot indicator to Yes. Cost share options can also be activated or deactivated, as needed by using the Active indicator. This allows a cost share to be deactivated without deleting it.
## URMS Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Who</th>
<th>Starts</th>
<th>Finishes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Project Scoping</td>
<td>Scoping Coordinator</td>
<td>New project is created</td>
<td>Checkbox—All Scoping Field View activities complete</td>
</tr>
<tr>
<td>Upload Preliminary Plans</td>
<td>Project Designer</td>
<td>New project is created</td>
<td>Project Designer uploads the preliminary plans</td>
</tr>
<tr>
<td>Review Preliminary Plans</td>
<td>Scoping Coordinator</td>
<td>Preliminary plans are uploaded</td>
<td>Plans are accepted (button)</td>
</tr>
<tr>
<td>Confirm Utility Involvement</td>
<td>Utility Design Coordinator</td>
<td>Confirm Involvement notification sent</td>
<td>Utility Involvement information is submitted (button)</td>
</tr>
<tr>
<td>Complete SUE Evaluation Process</td>
<td>Project Designer</td>
<td>Project status changes to Conflict Identification</td>
<td>PM/Designer submits the quality level decision (button)</td>
</tr>
<tr>
<td>Review SUE Evaluation</td>
<td>Utility Unit Oversight</td>
<td>PM/Designer submits the completed SUE evaluation</td>
<td>DURA approves or rejects the SUE impact form (button)</td>
</tr>
<tr>
<td>Upload Incorporated Work Request</td>
<td>Utility Design Coordinator</td>
<td>Utility identifies an &quot;Incorporated&quot; Work Unit Work Type or Utility generates a cost share offer letter with incorporated work selected for the Cost Share Percentage or Fast Path: Utility indicates &quot;Incorporated&quot; in its Involvement</td>
<td>Utility uploads the incorporated work request or Utility resets its selection of incorporated work in the Work Unit or in the Involvement or Fast Path: Utility deselects &quot;Incorporated&quot; in its Involvement</td>
</tr>
<tr>
<td>District Review Incorporated Work Request</td>
<td>Conflict Coordinator</td>
<td>Incorporated work request is uploaded</td>
<td>District approves or returns the request (button)</td>
</tr>
<tr>
<td>Review Incorporated Work Request (Local Project)</td>
<td>Utility Unit Oversight</td>
<td>District approves an incorporated work request for a local project</td>
<td>Utility Unit Oversight approves or returns the request</td>
</tr>
<tr>
<td>Upload Final Design Plans</td>
<td>Project Designer</td>
<td>Project status changes to Conflict Identification</td>
<td>Project Designer uploads the final design plans</td>
</tr>
<tr>
<td>Review Final Design Plans</td>
<td>Conflict Coordinator</td>
<td>Project Designer uploads the final design plans</td>
<td>DURA accepts the plans (button)</td>
</tr>
<tr>
<td>Review Test Hole Request</td>
<td>DURA</td>
<td>Test hole request is submitted</td>
<td>DURA submits the review (button)</td>
</tr>
<tr>
<td>Task</td>
<td>Who</td>
<td>Starts</td>
<td>Finishes</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>----------------------------</td>
<td>-------------------------------------------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Review Consultant Agreement</td>
<td>Central Office user</td>
<td>Consultant agreement is uploaded</td>
<td>Central Office approves or returns the consultant agreement (button)</td>
</tr>
<tr>
<td>Resolve Conflicts</td>
<td>Utility Design Coordinator</td>
<td>Resolve Conflicts notification sent</td>
<td>Resolutions and work units are submitted (button)</td>
</tr>
<tr>
<td>Resolve Conflicts – Accelerated</td>
<td>Utility Design Coordinator</td>
<td>CO Section Chief approves the cost share</td>
<td>Resolutions and work units are submitted</td>
</tr>
<tr>
<td>Review Resolutions &amp; Work Units</td>
<td>Conflict Coordinator</td>
<td>Utility submits resolutions and activities for all its conflicts</td>
<td>Work Units and Construction Details are approved (button)</td>
</tr>
<tr>
<td>Project Designer Review of Resolutions &amp; Work Units</td>
<td>Project Designer</td>
<td>Utility submits resolutions and activities for all its conflicts</td>
<td>Designer responds to and submits the resolutions and work units (button)</td>
</tr>
<tr>
<td>Review Substitute ROW Request (District)</td>
<td>Conflict Coordinator</td>
<td>Utility submits substitute ROW request</td>
<td>District approves or returns the request (button)</td>
</tr>
<tr>
<td>Review Substitute ROW Request (CO)</td>
<td>CO Agreement Coordinator</td>
<td>District approves the request</td>
<td>Central Office approves or returns the request (button)</td>
</tr>
<tr>
<td>Review RPI Request (District)</td>
<td>DURA</td>
<td>RPI request is submitted</td>
<td>DURA approves or returns the request (button)</td>
</tr>
<tr>
<td>Review RPI Request (CO)</td>
<td>CO Agreement Coordinator</td>
<td>DURA approves the request</td>
<td>Central Office approves or returns the request (button)</td>
</tr>
<tr>
<td>Review RPI Request (OCC)</td>
<td>OCC Attorney</td>
<td>Central Office approves the request</td>
<td>OCC attorney approves or rejects the request (button)</td>
</tr>
<tr>
<td>Review RPI Determination (CO)</td>
<td>CO Agreement Coordinator</td>
<td>OCC approves the request</td>
<td>Central Office approves or returns the request (button)</td>
</tr>
<tr>
<td>Review RPI Determination (District)</td>
<td>DURA</td>
<td>Central Office approves the request</td>
<td>DURA approves or returns the request (button)</td>
</tr>
<tr>
<td>District Review Cost Share Request</td>
<td>Utility Unit Oversight</td>
<td>Cost share request document is uploaded</td>
<td>District approves or returns cost share request document (button)</td>
</tr>
<tr>
<td>Review Cost Share Offer</td>
<td>Utility Design Coordinator</td>
<td>District submits cost share offer</td>
<td>Utility generates a cost share letter or declines the offer</td>
</tr>
<tr>
<td>Upload Signed Cost Share Letter</td>
<td>Utility Design Coordinator</td>
<td>Utility generates a cost share letter</td>
<td>Document Type &quot;Signed Cost Share Letter&quot; is uploaded by the utility</td>
</tr>
<tr>
<td>Task</td>
<td>Who</td>
<td>Starts</td>
<td>Finishes</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>----------------------------</td>
<td>------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Review Cost Share Letter (CO)</td>
<td>CO Agreement Coordinator</td>
<td>Document Type &quot;Signed Cost Share Letter&quot; is uploaded by the utility</td>
<td>Central Office approves or returns the signed cost share letter (button)</td>
</tr>
<tr>
<td>Review Cost Share Letter (CO Section Chief)</td>
<td>CO Section Chief</td>
<td>Central Office approves the signed cost share letter</td>
<td>Section Chief approves or returns the signed cost share letter (button)</td>
</tr>
<tr>
<td>Submit Preliminary Estimate</td>
<td>Utility Design Coordinator</td>
<td>CO Section Chief approves the signed cost share offer</td>
<td>Estimate form is approved</td>
</tr>
<tr>
<td>District Review Preliminary Estimate</td>
<td>Utility Unit Oversight</td>
<td>Utility submits the preliminary estimate</td>
<td>District approves the preliminary estimate (button)</td>
</tr>
<tr>
<td>CO Review Preliminary Estimate</td>
<td>CO Agreement Coordinator</td>
<td>District approves the estimate</td>
<td>Central Office approves or returns the estimate (button)</td>
</tr>
<tr>
<td>Complete Utility Clearance</td>
<td>Conflict Coordinator</td>
<td>Project status changes to Contract Development</td>
<td>District generates the clearance document (button)</td>
</tr>
<tr>
<td>Review Utility Clearance</td>
<td>CO Agreement Coordinator</td>
<td>District generates the clearance document or District approves the clearance submitted by the contractor</td>
<td>Central Office approves or returns the clearance (button)</td>
</tr>
<tr>
<td>Generate Final Utility Clearance</td>
<td>Conflict Coordinator</td>
<td>Conditional utility clearance is generated</td>
<td>District generates a non-conditional utility clearance</td>
</tr>
<tr>
<td>Generate Final UCC</td>
<td>CO Agreement Coordinator</td>
<td>Conditional UCC is generated</td>
<td>Central Office generates a non-conditional UCC</td>
</tr>
<tr>
<td>Create an Agreement</td>
<td>CO Agreement Coordinator</td>
<td>Estimate form is approved for the utility</td>
<td>Draft agreement is sent to the utilities</td>
</tr>
<tr>
<td>Upload Signed Agreement</td>
<td>Utility Administrator</td>
<td>Document Type &quot;Agreement&quot; is uploaded for the utility</td>
<td>Utility uploads a Document Type &quot;Signed Agreement&quot;</td>
</tr>
<tr>
<td>Upload Signed Agreement (non-BP)</td>
<td>CO Agreement Coordinator</td>
<td>Document Type &quot;Agreement&quot; is uploaded for the utility</td>
<td>Document Type &quot;Signed Agreement&quot; is uploaded</td>
</tr>
<tr>
<td>CO Upload Executed Agreement</td>
<td>CO Agreement Coordinator</td>
<td>Document Type &quot;Signed Agreement&quot; is uploaded for the utility</td>
<td>Central Office uploads a Document Type &quot;Signed Agreement&quot;</td>
</tr>
</tbody>
</table>