WSSC Easement Submittal Guidelines

Prepared by the:

Land Services Section

Engineering & Environmental Services Divisions

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Avolve Software - ProjectDox (Version 9.1.1.7)

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Introduction

This manual should provide you a basic overview of using the Land Services Section Easement Review Workflow thru WSSC's ePlan review system. As part of WSSC's efforts to be environmentally responsible and more responsive to the consultant community's needs, WSSC began reviewing water and sewer plans online in 2014 and easement packages in 2018. The goal has been to reduce the amount of paper used, to provide a better review response time, and to better track the status of right of way projects.

Easement Preparation Guidelines and Checklist

In addition to this submittal guideline, the Land Services Section website has the following resources available to assist you in preparing a thorough and complete WSSC Easement submittal that will require minimal revisions. The WSSC Easement Preparation Guide covers the general requirements of a WSSC Easement package, and of each document submitted therein for review. Use this link: https://www.wsscwater.com/files/live/sites/wssc/files/landunit/WSSC%20Easement%20Prep%20and%20Submittal%20Guidelines%20FY2018.pdf

Although a checklist for Right of Way Review is in Appendix B of our guidelines, it is also provided separately in:

https://www.wsscwater.com/files/live/sites/wssc/files/landunit/Checklist%20for%20ROW%20Review.pdf

Please actively use the checklist as it is the basis of what review staff will be looking for while checking your documents. Please check your work and make sure your package is complete prior to submittal. Use appropriate naming conventions when preparing your files for submission.

File Naming Conventions

General Guidelines: Name files such that it is easier for you to upload properly (especially in projects with multiple owners) and for WSSC to easily identify. Put in only those files that apply to that folder.

<u>Easement Intake Form:</u> Use the WSSC Contract # - Grantor name, followed by (Owner #) if multiple grantors in the submittal. **Examples: DA1234A17-Douglas (2)** or **DA1234A17-ABC LP (Owner 3)**

<u>Schedules & Engineering Plans:</u> Use the WSSC Contract # - Document type **Examples: DA1234A17-Schedule A** or **DA1234A17-Schedule B – Color** For projects with multiple owners, consider adding the owner # after each file name.

<u>Supporting Documents:</u> Use General Guidelines and common sense, naming files so that they are easily identified. If there are multiple deeds in your supporting documents, you can add a description.

Examples: PB 123 PG 45, SRC Plat 12345, L 123 F 45, Ex WSSC Esmt L1234 F56

Initiating an ePlan Easement Review Project Setup

Before an easement will be reviewed online thru Land Services Section's ePlan workflow, your project's design and associated dependencies must be finalized. Some of these dependencies include the recordation of record plats dedicating public streets, necessary land transfers (if applicable) or execution of other WSSC easements which the new easement connects to. When these things are complete you may request authorization for easement submittal from your WSSC Development Services (DSD) or Pipeline Design Division (PDD) Project Manager. The Land Services Section cannot setup an easement review without their authorization. While requesting their permission to start an easement review you must complete the following Intake Authorization Form and email it to Project Manager with your request.

https://www.wsscwater.com/files/live/sites/wssc/files/landunit/EASEMENT%20INTAKE%20AUTHORIZATION%2 0FORM.pdf

If the WSSC Project Manager believes that the project is ready for easement submittal, they will forward the form to ROWReview@wsscwater.com. Please do not directly email or cc Land Services Staff or ROWReview with your request to proceed with easement review. To facilitate an easier setup process for Land Services staff, please be sure to "save" your completed easement intake form (not print to PDF). A saved PDF allows us to copy and paste information directly from your form into our specific easement review project setup form without errors. Also, please make sure that the contact name and email are correct and match the person who will be submitting and processing your documents. That contact person will receive an invitation to the project (Fig. 1) and notification to upload documents into ProjectDox (see Fig. 5) once setup is complete and will receive all subsequent notifications.

-	Plan Review In	nvitation
Hello Terry Blo	mquist:	
response to you	ur Easement Submi	ew (ProjectDox) system. This project invitation has been sent to you in ission and Review Request. A project has been created to allow you to it package and supporting documents for plan review.
	e Project Access lin our User Login and	
		ion, please contact a Land Services Section Staff Reviewer and request g in. You will find LSS Staff contact information below.
		ion, please contact a Land Services Section Staff Reviewer and request
	rary password to log	ion, please contact a Land Services Section Staff Reviewer and request g in. You will find LSS Staff contact information below. EasementReviewRequest@wsscwater.com
	User Login:	ion, please contact a Land Services Section Staff Reviewer and request g in. You will find LSS Staff contact information below. EasementReviewRequest@wsscwater.com
	User Login: Project Number:	ion, please contact a Land Services Section Staff Reviewer and request g in. You will find LSS Staff contact information below. EasementReviewRequest@wsscwater.com DA5577A20-ESMT

Logging In

The URL to log in to WSSC's ProjectDox portal is:

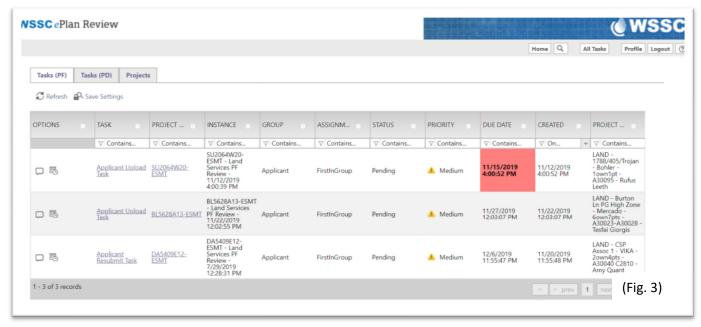
https://planreview.wsscwater.com/ProjectDox/

If you have never logged in to ProjectDox before, a WSSC ProjectDox Administrator may create a basic user profile for you OR you will be prompted to create a profile when you login the first time through a project invitation link. You will then follow the link to the main page login screen (Fig. 2) and log in to ProjectDox for the first time. Please note that for ePlan to work properly, you will need to turn off your internet browser's pop up blocker. The system will prompt you to change the temporary password and will allow you to fill out some profile details if you wish. Near the bottom of the main log in screen (Fig. 2) you will also see hyperlinks to various available user guides. The most helpful for a new user beyond this guide is the "ePlan Review Quick Guide".

	WSSCWATER DELIFICION THE ESSINITAL
	Your access to and use of the WSSC Water ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions
ePlan Review	E-mail: Password: Login Forgot your password?
⊕ 2	021 Avolve Software. ProjectDox (Version 9.1.9.904) is a trademark of Avolve Software. All rights reserved.

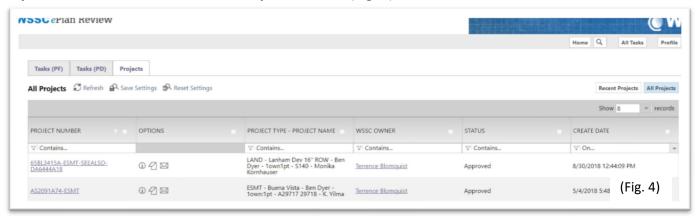
User Home Screen / Main Page

After logging in, you will be presented with the user home screen or main page (Fig. 3). This screen provides you with an overview of projects you are actively working on and projects which you have been assigned a task to complete. Notice in the upper right-hand corner the "Home" button; any time you hit the "Home" button within ProjectDox, you will be returned to this screen.



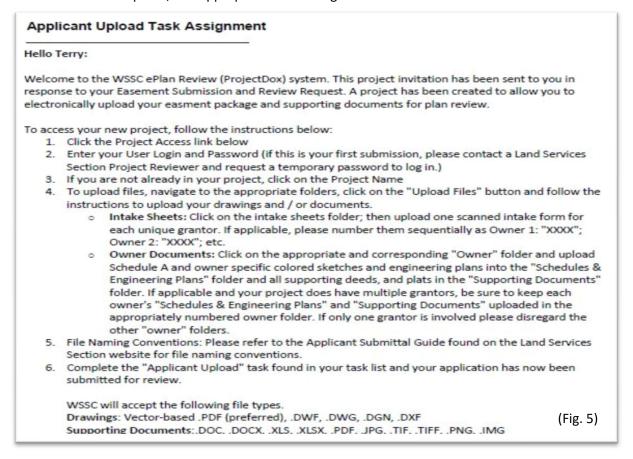
Notice the 3 tabs in the upper left screen (of Fig. 3) titled, "Tasks (PF), Tasks (PD), and Projects". The Tasks (PF) tab displays active projects which have active tasks assigned to you to complete. Other available information includes; project status, the due date of your task, and your project name. The Tasks (PD) tab is now obsolete and only applies to easement review projects created before June 2018.

The **Projects** tab allows you to view or search all projects you are currently working on or projects you have viewed in the past; they are presented in reverse chronological order, and defaults to view only your most recent projects. To view all projects you have participated in since establishing a WSSC ProjectDox account, click on the "All Projects" button (Fig. 4).

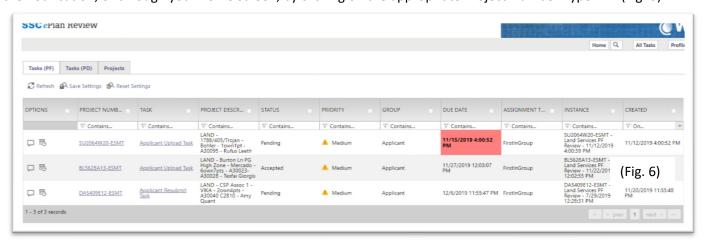


Task Notification

After an Easement Review Project has been set up, you will receive the following notification email, telling you what documents to upload, and appropriate formatting:

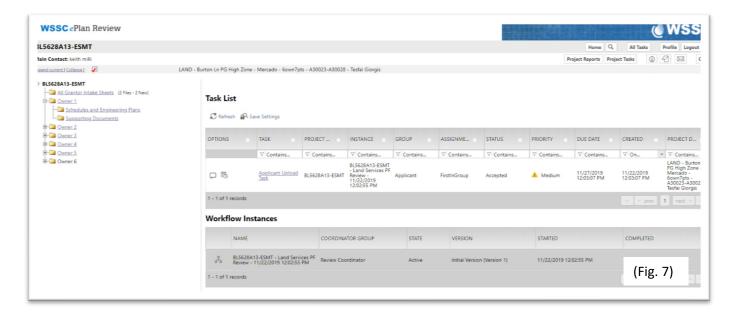


After receiving your first task notification (Fig. 5), you may access the project by either clicking on the link within the notification, or through your home screen, by clicking on the appropriate Project Number hyperlink (Fig. 6).

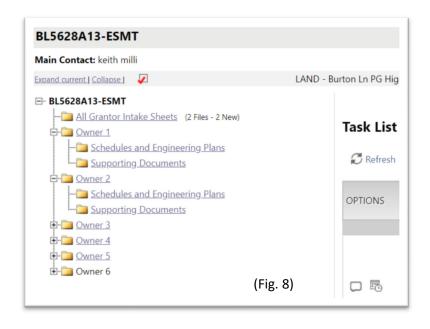


Initial File Upload

Once in your project review screen (Fig. 7), the layout of the project review screen is generally self explanatory. On the left are folders where you will upload documents. In the center you will see a Task List area, that displays available tasks.



Within the project you will upload your documents in the directory folders (Fig. 8). Be sure to click on the plus (+) signs to expand and view subfolders under each owner.

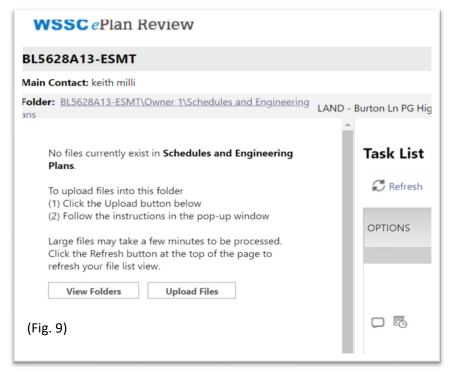


Please upload files as follows:

All Easement Intake Transmittal forms are to be uploaded in the "All Grantor Intake Sheets" folder.

For each owner, upload the description, sketch(es) and engineering plan sheet(s) applicable to that owner only under the "Schedules and Engineering Plans" subfolder; and upload applicable deeds and plats to the "Supporting Documents" subfolder. Although our project setup defaults to a 5 owner maximum, we can adjust that higher based on information provided on the Intake Authorization sheet.

To upload your files, click on the folder or subfolder that you want to upload into. If the folder is currently empty, the screen shown below (Fig. 9) will prompt you. Click on "Upload Files" and follow the instructions given to complete your easement document upload. If you are adding more documents to a folder that already has documents in it, you have the option to click the "Upload Files" button at the top of the folder.



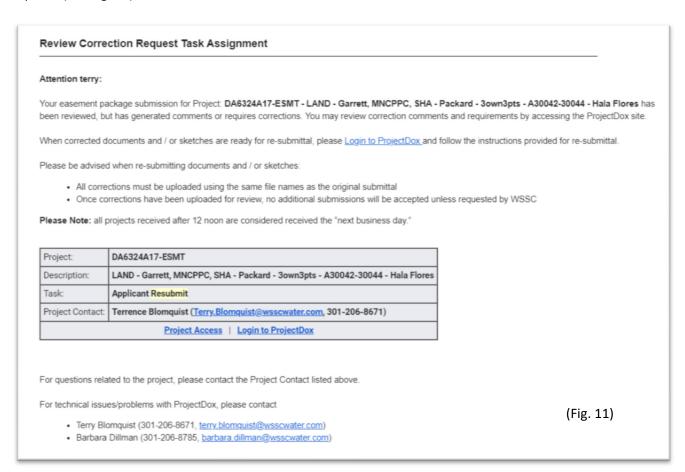
Having uploaded your documents into the appropriate project folders, accepted the applicant upload task from within the project task list, (Fig. 7) or on the user home screen by clicking on the task hyperlink (Fig 6). Doing this will initiate the "Applicant Upload" eForm (Fig. 10). To complete the task, click the check box that reads in part, "I have uploaded all required..." and then hit the "Upload Complete - Submit to WSSC" button. This completes your applicant upload.

Review Information	
Project Name:	SU1730W19-ESMT
	LAND - Coz Apts+Coz Retail - Soltesz Lanham - 2owners - A30058 30059 - Garrett Watkins
	WSSC ePlans
	Land Services Review/Applicant Upload terry test (blomdog@gmail.com)
The state of the s	
Task Instructions	
Please upload all intake sheet	s, schedules, engineering plans and supporting documents into the appropriate folders. Please Id follow appropriate naming convention for each file. After you have successfully uploaded all
	id follow appropriate framing convention for each file. After you have successfully uploaded all
refer to the Applicant Guide an required files please click the (Upload Complete - Submit to WSSC) button to complete your Applicant Upload task.

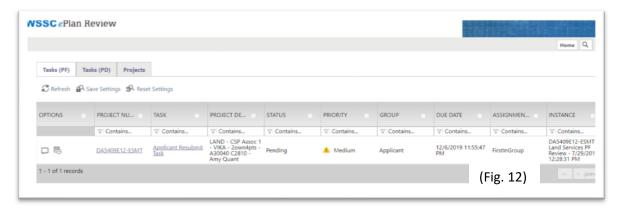
Prescreen and First Cycle Review Corrections

After you have completed your initial submittal, the project task assignments return to WSSC. LSS staff will prescreen your work, making sure that all your documents conform to what is required in the Easement Preparation Guidelines. If all the required documents have been uploaded and the overall presentation is of good quality, the easement review will be forwarded to WSSC staff for further review and assignments. If your submittal is missing documents or is otherwise deficient, no further detailed review will take place and you will be notified via ProjectDox that you have a new "Prescreen Correction Upload" task. To resolve this, follow the instructions written by a Land Services staff member in your prescreen correction eForm and resubmit your project in the same way as previously described.

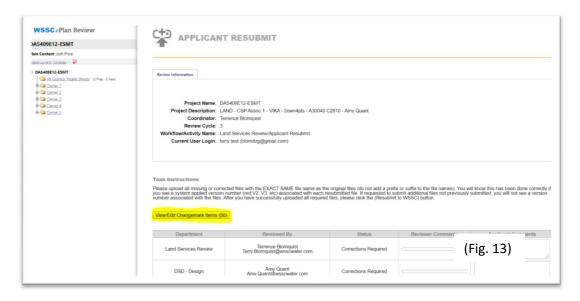
Once passing prescreen review, your easement submittal is forwarded to the appropriate WSSC DSD or PDD Project Manager for review. Upon their approval, LSS staff completes their technical review. Unless your initial submittal is completely free of errors, you will receive notification(s) via the system email that corrections are required (see Fig. 11).

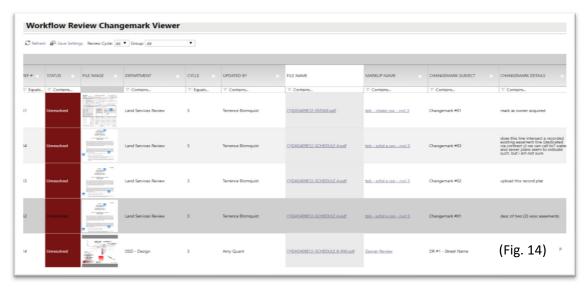


Upon receipt, you can log in to Project Dox and will have an available task (Applicant Resubmit Task) displayed on your user home screen (see Fig. 12).

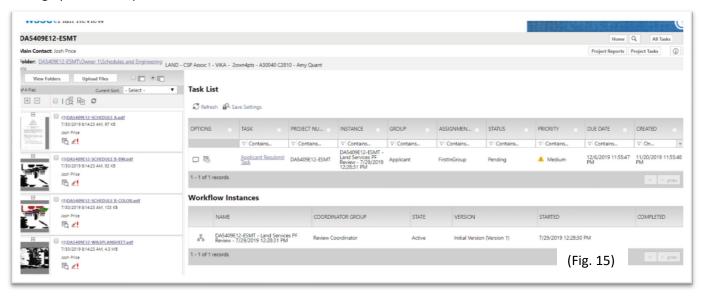


There are 2 ways to review WSSC's comments – **First** by clicking on your task, the "Applicant Resubmit" eForm pops up (Fig. 13); then you can view comments in report form by clicking on "View/Edit Changemarks", which will generate the "Workflow Review Changemark Viewer" (Fig. 14).

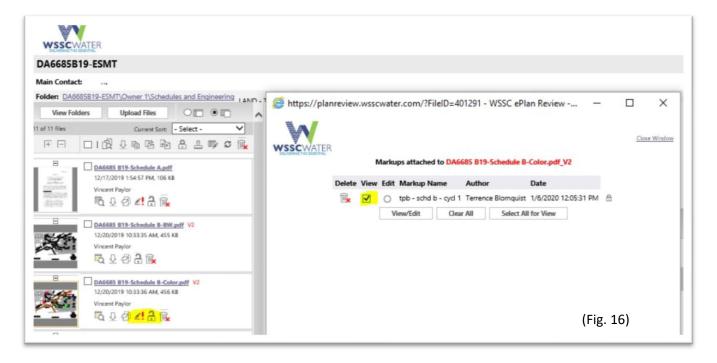




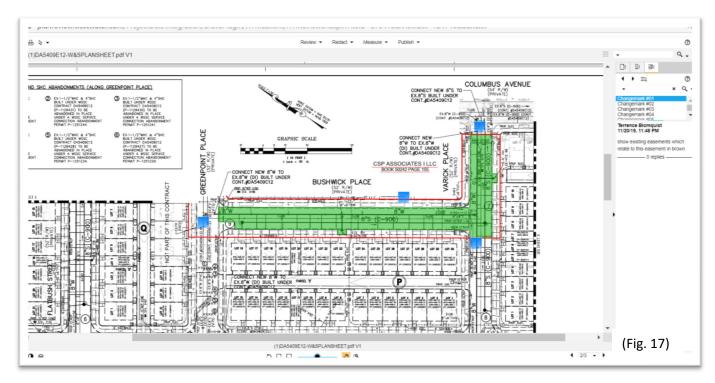
OR Second by clicking on your project number, you can go into the project review screen's folders and for each file that requires review click on the markups icon, (a pencil shown as a red exclamation point beside it - Fig. 15) to bring up the markups attached to that file.



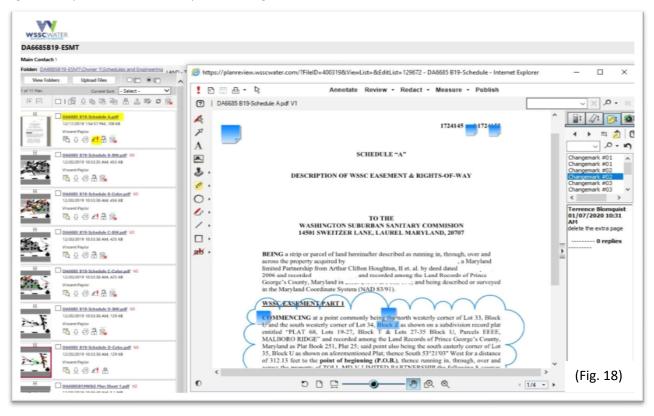
Then check the view box and click on view/edit (Fig. 16) to view comments & changemarks (Fig. 17).



An interactive pop up window generates, showing the selected file marked up. (Fig. 17 & Fig. 18)

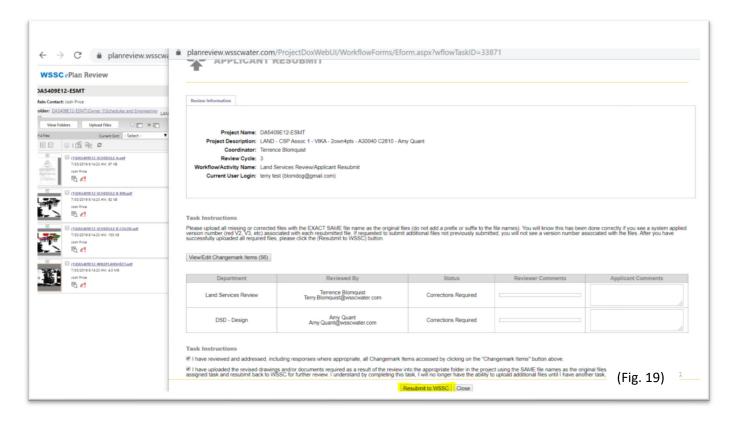


By clicking on any of the changemarks on the document, you can read the detailed comments in the upper right portion of the screen. Conversely, by clicking on a changemark in the upper right screen the document will zoom to the area with the error. Figure 17 shows an engineering plan marked up; Figure. 18 shows a Schedule A – Legal Description also marked up with changemarks.



Uploading Review Corrections

After you have made corrections to your documents, re-upload them to the correct subfolders, keeping the original file name(s). Do no attempt to version the files yourself as Project Dox will do this automatically. After your upload is complete, you can click on your Applicant Resubmit Task to complete your submittal. Once you have checked the certification boxes, you certify that you have addressed all comments and are ready to resubmit to WSSC (Fig. 19).



The Land Services Section Staff will be notified about your re-submission and begin a second cycle revision review. If the requested revisions are acceptable, and no additional errors are found, your project will be approved. Otherwise, it will be returned and the process for corrections will repeat.

Project Approval - Notification

When your submittal has been fully reviewed and is free of any errors or omissions, you will receive one of two email approval notifications. The first is an "Approved Easement Package Notification" which directs you to send in signed original hard copy easement documents to the Land Services Staff (Fig. 20). LSS Staff will then prepare original easement legal documents for the property owner's execution.



Attention Terry:

We are pleased to inform you the referenced WSSC easement package has been approved. Please submit the following, for each owner, to the Land Services Section:

- Easement Intake Form
- · 2 Original signed (sealed and dated) Schedule A descriptions
- 1 Mylar and 1 black and white copy (or 2 black and white copies if "A" sized) and 1 colored copy of each sketch
- 2 Colored plan sheets (all that apply)

NOTE: This approved hard copy submittal may be sent by Post or Commercial Carrier Post (be sure the package can be tracked) to:

Heidi Aragon Right of Way Review Approved Submission WSSC Land Services Section - 5th Floor 14501 Sweitzer Lane Laurel, MD 20707

NOTE: Currently due to COVID-19, WSSC's RGH Headquarters building is closed to the public. Until such time as the building is re-opened to the public, the Land Services Section cannot accept any drop offs by courier services.

NOTE: You will be contacted by Land Services Section Property Acquisition staff when the legal documents are ready for owner signature.

Project: DA5577A20-ESMT

Description: LAND - Land Services Email Forms

Task: Notify Applicant Hard Copy

Project Contact: | WSSC EPlans (planreview@wsscwater.com, 301-206-8650)

Project Access | Login to ProjectDox

(Fig. 20)

In the second, you will receive an "Approved Easement Documents Ready for Download Notification" email (Fig. 21). In this option, WSSC LSS staff has already uploaded the project specific legal documents. The email explains in detail what to do to furnish WSSC with valid original documents for WSSC to countersign and record. Please note that any alterations made to the provided document will result in your document being voided entirely and could affect future rights to this option.



WSSCWATERApproved Easement Documents Ready for Download Notification

Attention Terry:

We are pleased to inform you the referenced WSSC easement package has been approved. Please refer to the <u>detailed instructions</u> provided below:

- 1. Download and print the prepared legal documents from the "Approved" folder.
- Attach original signed (sealed and dated) Schedule A description and appropriate sketch(es) as approved.
- Obtain notarized Owner Signature(s)
- 4. The following original documents for each owner must be returned to the Land Services Section:
 - Original signed and notarized legal document
 - Easement Intake Form
 - 2 Original signed (sealed and dated) Schedule A legal descriptions
 - 1 mylar and 1 black & white paper copy (or 2 black & white if "A" sized) and 1 colored copy of each sketch
 - 1 colored plan sheet (all that apply)
- Return all original documents via Post or Commercial Carrier Post (be sure the package can be tracked) to:

Heidi Aragon Right of Way Approved Submission WSSC Land Services Section - 5th Floor 14501 Sweitzer Lane Laurel, MD 20707

NOTE: Currently due to COVID-19, WSSC's RGH Headquarters building is closed to the public. Until such time as the building is re-opened to the public, the Land Services Section cannot accept any drop offs by courier services.

NOTE: Any alterations to the prepared legal document will result in rejection of your final document submission.

Project: DA5577A20-ESMT

Description: LAND - Land Services Email Forms

Task: Notify Applicant Electronic

(Fig. 21)