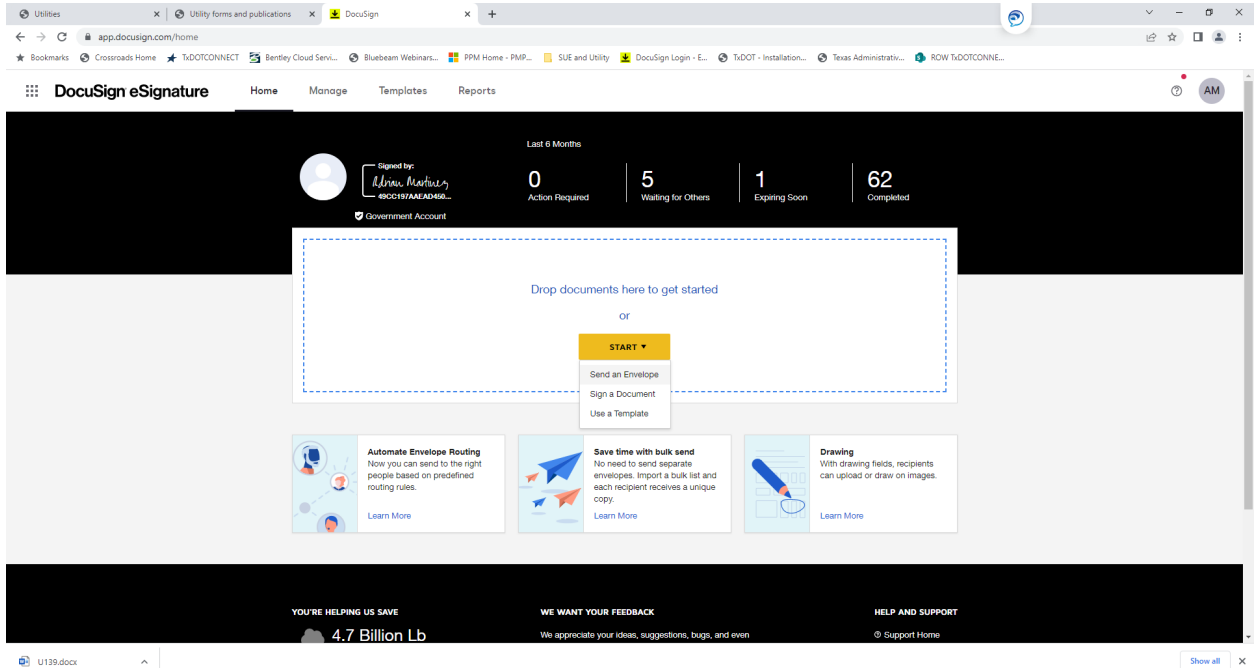


NORA DocuSign Procedure

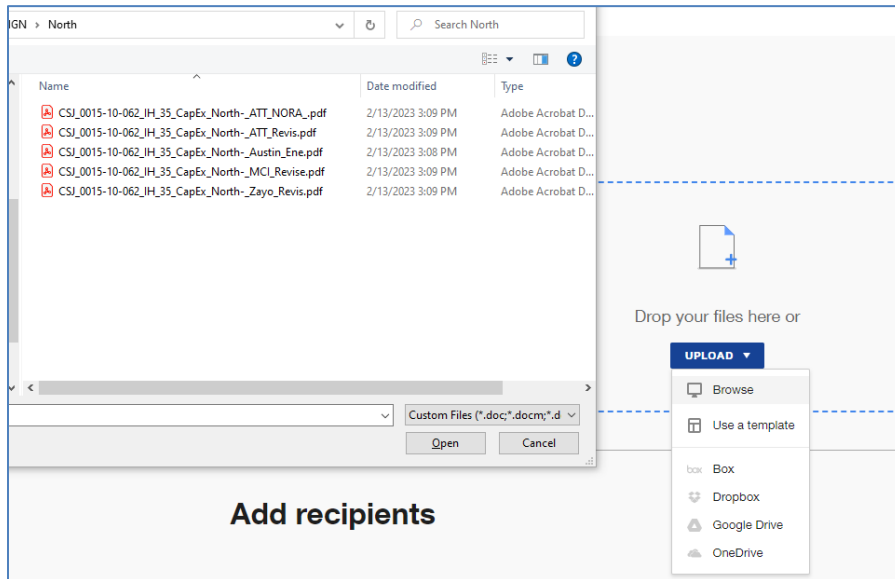
This procedure is to be accomplished by the Design Project Manager or Project Utility Coordinator once the NORA letter has been drafted and TxDOT approved it.

1) Login to DocuSign



2) Create an Envelope (Each Utility Company gets its own Envelope. Do not send one DocuSign package with multiple utilities. This can cause an issue with the Clearance Letters)

a) Upload NORA Letter



b) Upload Clearance Letter

- i) Clearance letter will be added in its native format with form fill on.

- c) Upload plan set in DocuSign or send separately by other means such as Dropbox.
 - Note: If the utility is not in conflict due to location or the utility is not going to relocate then the NORA letter does not need to be sent. NORA is for relocations only.

3) Set signing order in DocuSign and add recipients show below in order

The signing order will be as follows:

- 1 Send to TxDOT Designee (Adrian Martinez) first for NORA letter signature only (Needs to Sign)
- 2 Send to Utility Representative for NORA confirmation and clearance letter signature (Needs to Sign)
- 3 Send to **TxDOT** PM (Receives a Copy)
- 4 Send to **TxDOT** Utility Coordinator (Receives a Copy)
- 5 Send to **Consultant PM** (Receives a Copy if applicable)
- 6 Send to Susana Ceballos (Susana.Ceballos@txdot.gov) (Receives a Copy)
- 7 Send to Stefan Srnensky (Stefan.Srnensky@txdot.gov) (Receives a Copy)

4) DocuSign Email Message

- a) Email subject line must include CSJ number, location name, and document(s) name
 - i) Example : CSJ 0914-26-009 Post Hill Street-NORA and Clearance Letters
- b) In the body of the email message describe the project and location in more detail.
- c) Explain the NORA and Clearance Letter uses and any other information related to the utility firm
- d) Give a dead line date for the documents to be sent back

5) DocuSign Advanced Options Edit

Advanced Options

Recipient Privileges

- Allow recipients to sign on paper
- Allow recipients to change signing responsibility or assign a delegated signer
- Allow recipients to edit
- Recipients must be signers to view signed documents

Reminders

- Send automatic reminders

Number of days before sending first reminder:

Number of days between reminders:

Expiration

Number of days before request expires:

Envelope will be queued for expiration on **7/2/2023**

Number of days in which to warn signers before expiration:

Sender Settings

- Affix envelope ID to top left of every document page

SAVE **CANCEL**

- a) Set Reminder on
 - i) First reminder at 7 days
 - ii) Follow up reminders every 5 days after.

Reminders

- Send automatic reminders

Number of days before sending first reminder:

Number of days between reminders:

- b) Set Expiration
 - i) Expires in 30 days
 - ii) Warning sent 3 days before expiration
 - iii) If DocuSign expires recall POC and then resend the package

Expiration

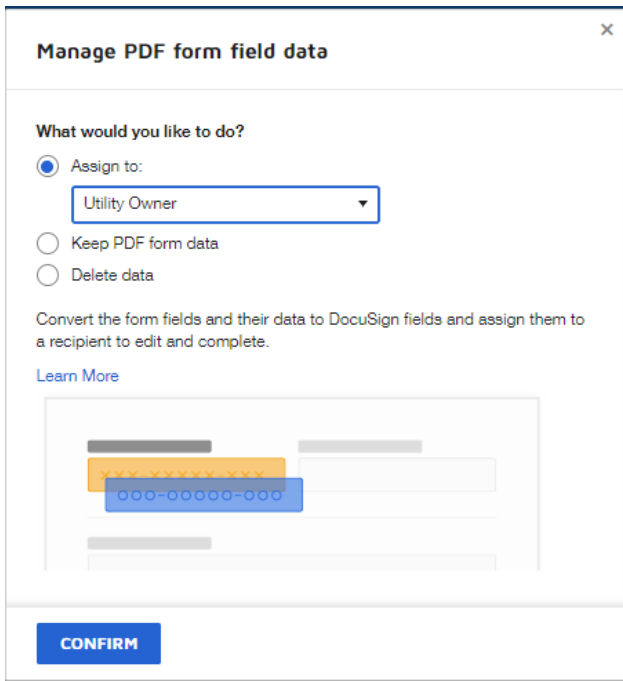
Number of days before request expires:

Envelope will be queued for expiration on **12/14/2020**

Number of days in which to warn signers before expiration:

6) Because the Clearance Letter has form fields DocuSign will ask if you want to assign management of those data fields.

a) Choose to Assign to whoever the Utility Representative is.



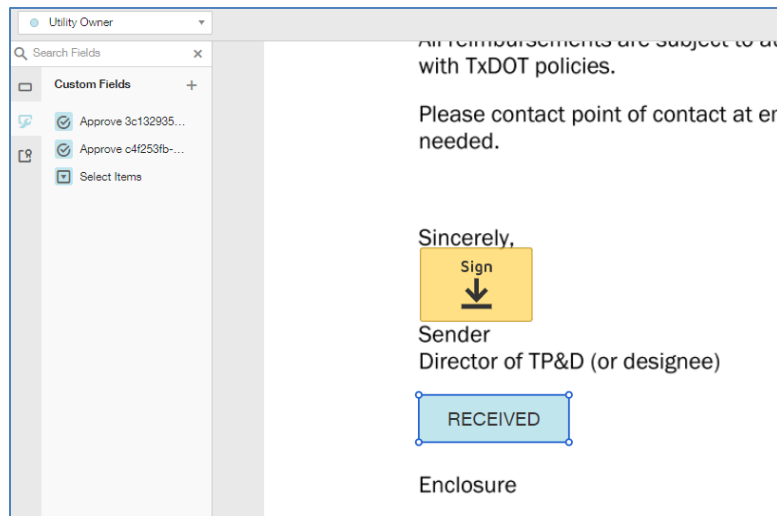
7) NORA Letter

a) Add signature block to page 2 for TP&D Director or designee

b) Add a "Received" or "Accept" button to bottom of page 2

i) This will be added for only the Utility Representative (not TP&D Director or designee)

ii) Do not use the "Initial" button. We don't need to add initials.



iii) The button is clicked on by the Utility Representative and is one step to verification of their receipt. This button will not show up on final document.

8) Clearance Letter

- a) Delete the Text boxes on the signature and date lines.

The information provided above is strictly an estimate and is provided to **State** solely for **State's** planning purposes. This letter is not intended to create any legally binding commitments on either **Utility or State**, nor to waive any rights **Utility or State** might otherwise possess.

If there is a conflict between prior submitted dates and those shown in this letter, the dates set forth above should be used for **State's** planning purposes.

Text
Authorized Utility Representative

Text
Date

Remove these text boxes

- b) Place Utility Representative Signature and Date Signed block on the bottom lines.

Utility Owner

Search Fields

Standard Fields

- Signature
- Initial
- Stamp
- Date Signed
- Name
- Email
- Company
- Title
- Text

Anticipated Construction Completion Date: Text

The information provided above is strictly an estimate and is provided to **State** solely for **State's** planning not intended to create any legally binding commitments on either **Utility or State**, nor to waive any right otherwise possess.

If there is a conflict between prior submitted dates and those shown in this letter, the dates set forth above **State's** planning purposes.

Sign

Authorized Utility Representative

Date Signed

Date

9) Attach Plan Set

- a) If plan set size allows, attach it to the envelope.
- b) Make sure that the plans show "SUBSTANTIALLY COMPLETE".
 - i) Either by watermark or
 - ii) In the title block
- c) If plan set is too large, send via Box.com or other file sharing application to all parties.

10) Reach out to Utility Representative

- a) Either before or immediately after the DocuSign is sent, please contact the Utility Representative to make them aware of the documents coming their way.