

SAMPLE EASEMENT
PROJECT CHECKLIST

IDI-????? Project Name	Done	Comments
Inform ISO Realty Specialist of any issues or changes that arise during the process		Risk decision points or danger areas
Inform FO of any issues or changes that arise during the process		Time sensitive items
* = Submit Electronically to SO for Review, ** = SO will Process FO Request or Provide to FO		Attention Items
Case Initiation:		
Identify willing landowners and complete case prework		
Verify project conforms to Land Use Plan		
Feasibility Review (Value, Title, Split Estate, Water, Tenants, etc.)		
Identify the Larger Parcel		
Draft Legals		
* Draft Acquisition Document (50 %)		
* Send request letter to ISO with supporting documents		Send letter after you have the appropriate Action Items completed
Prepare Letter of Intent / Right to Enter		
Establish case file & input into computer system (LR2000)		
Title:		
Verify Legals, re-draft if needed		
Establish who will transfer title		
* Select Title Company		
* If business entity involved, collect corporate docs		
** Order title commitment ON LARGER PARCEL		
** Receive title commitment		
** Review title commitment (Differences in Legal and Identify Issues)		
** Resolve title issues: improper deeds, unresolved estates, powers of attorney, authority to sell		
LSR:		
* Final Legals		
* Prepare Exhibit A (Plat for Perpetual Map for Temporary)		
* Prepare Legal Surveyor Services Request (LSSR)		
Complete LSR certificate and/or Chain of Surveys (COS)		
Resolve legal description issues identified in LDR (spell out)		
* Re-request LSR if necessary		
Complete LSR Memo Request if necessary		
Any changes to legal description will require ISO to complete an LSR Memo		
Field Office Processing:		
* Complete Certificate of Inspection and Possession (CIP) No. 1 with appropriate technical experts		
* Complete water rights review (if appropriate)		
Review minerals information		
* Prepare Mineral Memo (if appropriate)		
* Prepare NEPA document		
Appraisal:		
* Draft Acquisition Document (90 %)		
Determine if Appraisal Waiver is Appropriate		
* Complete OVS (spell out) Worksheet		
* Complete Appraisal Waiver		Appraisal Waiver Only, with OVS for review

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* Request appraisal & enter in IVIS		
** Review and approve appraisal request		
** Prepare purchase requisition for appraisal contract		OVS Appriaisal Only
* Review SOW & associated docs for appraisal contract		OVS Appriaisal Only
** Review appraisal received (180 Days, additional guidance if longer on a case-by-case)		
Pre-Closing:		
* Prepare Pre-Acquisition Environmental Site Assessment (ESA) or (PALS) (180 Days of Close)		
Resolve issues identified during ESA		
** Prepare offer letter. Make offer contingent on trespass resolution and Preliminary Title Opinion.		
** Forward offer letter to FO		
* Offer Letter Accepted		
* Execute offer documents & return to ISO Realty Specialist		
** Review final easement document		
** Prepare subordination documents		
** Draft consideration voucher		
** Draft waiver of consideration and appraisal document		
** Request Preliminary Title Opinion		
** Receive Preliminary Title Opinion		
** Draft escrow instructions		
** Draft closing costs voucher		
** Get wire instructions from title company		
* Prepare CIP No. 2		
** Prepare settlement statement		
** Review closing documents		
** Request Pro Forma from title company		
** Review and approve Pro Forma		
** Obligate funds		
* Schedule closing		
** Request purchase funds be wired to escrow		
Execute Documents		
** Record documents		
** Receive Final Title Policy		
Closing:		
** Review final documents & policy for accuracy		
** Pay closing costs		
** Request Final Title Opinion		
** Receive Final Title Opinion		
** Final Update of LR2000 and send file to ISO for records notation		