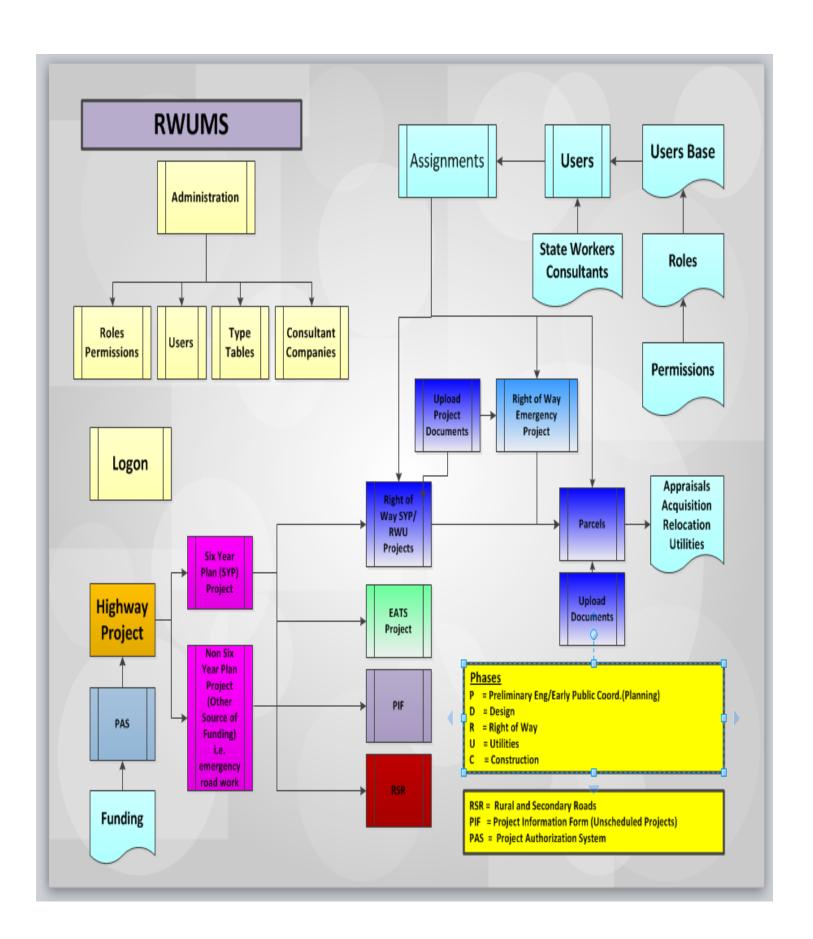
## RWUMS Release Document

# Nov 2011



#### **KYTC**

Transportation Cabinet
Office of Information Technology



#### Provide the ability for more than one Highest and Best use

• Task 2445 - Sheet 05, 08, 11, 14 - Add ability to add more than one H&B Use Comparison Establish a true value for a parcel by splitting the parcel up based on areas of usage. The ability to split areas of usage on a parcel allows the appraiser to use the appropriate Comp Sale in the comparison for that H&B, which allows a true value for that section of the parcel to be established. The result of each H&B Comparison would be added together to give a true comparison value of the parcel as compared to the subject property.

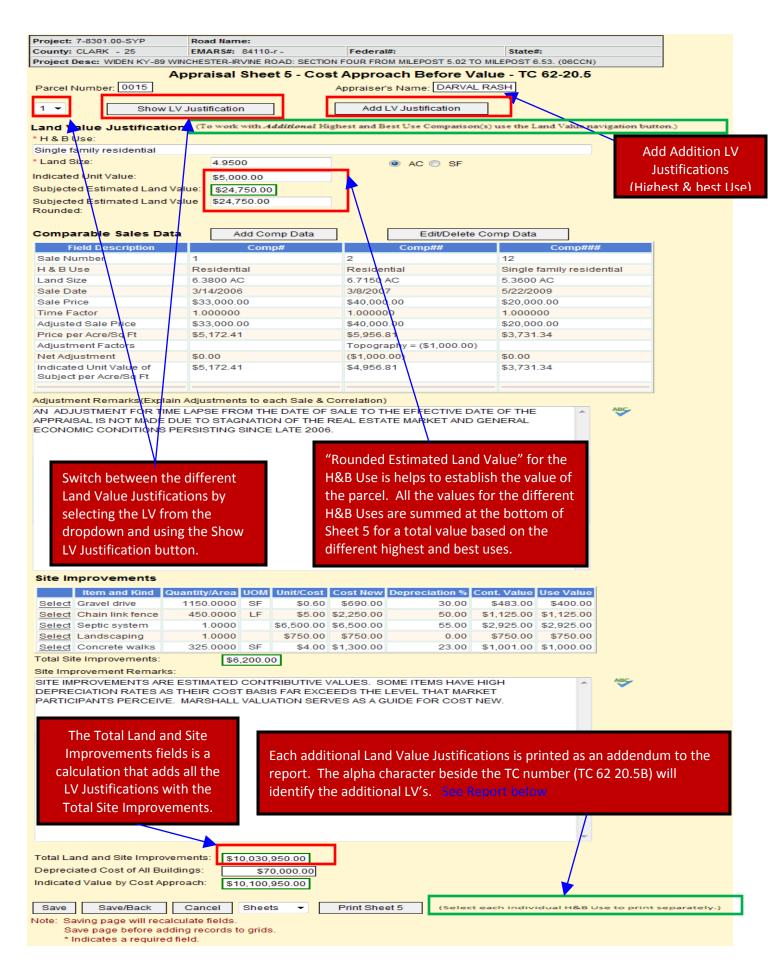
See Sample Sheet 5 below.

With a Parcel there may be more than one H&B Use for a parcel. In order to do thorough examination of the Valuation Approach you have to have the ability to look at the parcel with different Highest and Best Use in mind. You have to look at the LV Justification using Comparable Sales for the various H&B Use as compared to the Subject Property to establish a true value of the property.

Use the **Print** button to create the report for the Approach; the first H&B Use is included. Print Additional H&B by Switching to the Highest and Best Use and using the print button, which adds an addendum to the report for each Highest & Best Use Comparison.

- Addition Highest & Best Use (LV (Land Value) Justifications) can be added by using the ADD
   LV Justification button.
- Work with different H&B Use Comparisons by switching to the different Highest & Best Use using the Show LV Justification.
- Print the Approach by a combination of the Print button and switching to the different LV
  Justifications using the Show LV justifications button.
- Task 2475 Sheet 05, 08, 11, 14 Need ability to remove LV Justifications that were created inadvertently and to associate additional LV Justifications back to the Appraisal Sheet.
  - The reports for Sheets 5, 8, 11, and 14 will be labeled with an alpha character to allow the sheets to be grouped together. Each addition Land Value Justification will have an alpha character associated with it with the header information to tie it to the project parcel and appraiser. The TC 62.5A is the first page of Sheet 5, TC62.5B is the second LV Justification associated with Sheet 5. The Site Improvements and totals sections will only be visible on the first page.
  - Land Class Justifications that were created inadvertently can be removed by using the
     Delete LV Justification Button. (The active LV Justifications should maintain their
     alphabetical order A, B, C even if one is deleted from the middle. Deleted LV Justifications
     will not show up in the dropdown list.) Note: LV Justifications cannot be removed from the
     first page.

For examples, see the samples below.



Note: This sample is from Sheet 5, but the same functionality is in sheets 5, 8, 11 and 14.



Kentucky Transportation Cabinet Division of Right of Way and Utilities TC 62-20.5A Rev. 04/11

Appraisal - Cost Approach Before Value

Item No.	Parcel No.	Appraiser Name		
7-8301.00-SYP	0015	DARVAL RASH		

#### 1. Land Value Justification (Use Vacant Land Sales Only) Subject Property H & B Use Single family residential Land Size 4.9500 UOM AC Comp # Comp # Comp # (0) Sale Number (1) H & B Use Residential Residential Single family residential (2) Land Size 6.3800 AC 6.7150 AC 5.3600 AC (3) Sale Date 3/14/2006 3/8/2007 5/22/2009 \$40,000,00 (4) Sale Price \$33,000,00 \$20,000,00 (5) Time Factor 1.000000 1.000000 1.000000 (6) Adjusted Sale Price \$33,000.00 \$40,000.00 \$20,000.00

\$5,956.81

(\$1.000.00)

\$4,956.81

Topography = (\$1,000.00)

#### Adjustment Remarks (Explain Adjustments to each Sale & Correlation)

\$5,172.41

\$5,172.41

\$0.00

AN ADJUSTMENT FOR TIME LAPSE FROM THE DATE OF SALE TO THE EFFECTIVE DATE OF THE APPRAISAL IS NOT MADE DUE TO STAGNATION OF THE REAL ESTATE MARKET AND GENERAL ECONOMIC CONDITIONS PERSISTING SINCE LATE 2006.

Subject Estimated Land Value	4.9500	AC	X	\$5,000.00	=	\$24,750.00

#### 2. Site Improvements

(10) Indicated Unit Value of Subject per

(7) Price per Acre/Sq Ft

(8) Adjustment Factors

(9) Net Adjustment

Item And Kind	Quantity /Area	UOM	Unit Cost	Cost New	Depr %	Contributing Value	Use Value
Gravel drive	1150.0000	SF	\$0.60	\$690.00	30.00	\$483.00	\$400.00
Chain link fence	450.0000	LF	\$5.00	\$2,250.00	50.00	\$1,125.00	\$1,125.00
Septic system	1.0000		\$6,500.00	\$6,500.00	55.00	\$2,925.00	\$2,925.00
Landscaping	1.0000		\$750.00	\$750.00	0.00	<b>\$</b> 750.00	\$750.00
Concrete walks	325.0000	SF	\$4.00	\$1,300.00	23.00	<b>\$</b> 1,001.00	\$1,000.00

#### 3. Total Site Improvements \$6,200.00

#### Site Improvement Remarks

SITE IMPROVEMENTS ARE ESTIMATED CONTRIBUTIVE VALUES. SOME ITEMS HAVE HIGH DEPRECIATION RATES AS THEIR COST BASIS FAR EXCEEDS THE LEVEL THAT MARKET PARTICIPANTS PERCEIVE. MARSHALL VALUATION SERVES AS A GUIDE FOR COST NEW.

4. Total Land and Site Improvements			/	\$1,040,950.00
5.5	(0) -10 11 - 10)	/	/	\$70,000,00
5. Depreciated Cost of All Buildings	(Sheet 6, Item 13)	1 /		\$70,000.00

#### 6. Indicated Value by Cost Approach

\$1,110,950.00

Note: Additional LV Justifications (H&B Use) Comparisons are show as addendums to the report.

Additional LV Justifications are displayed as addendums to the report.

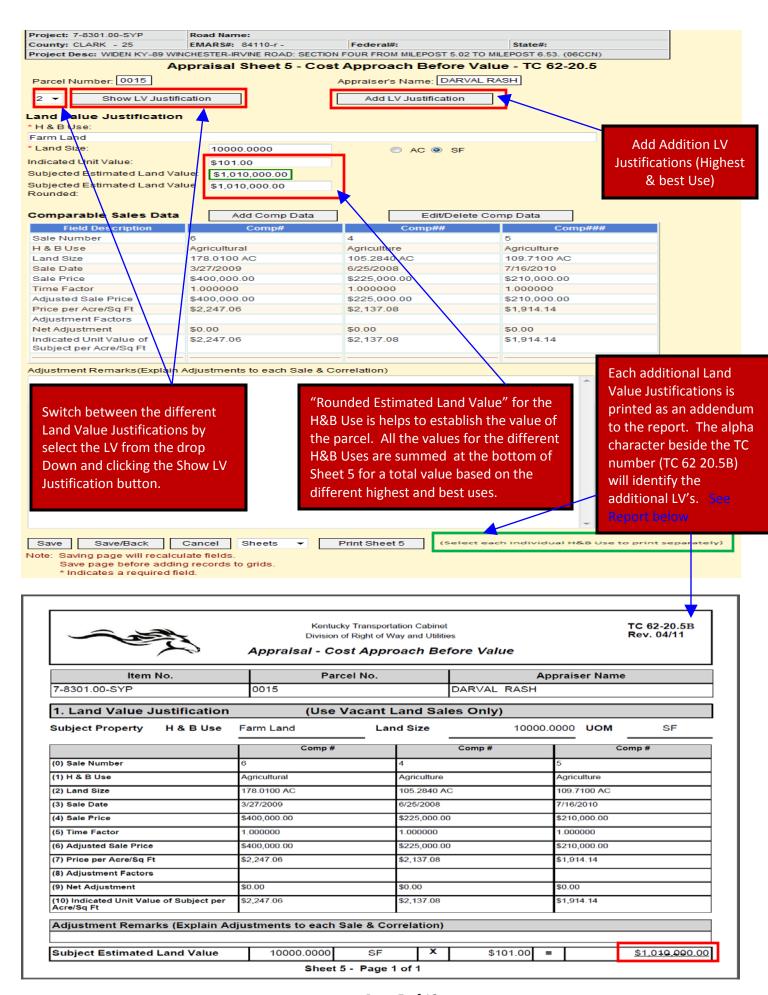
Sheet 5 - Page 1 of 1

The Total Land and Site Improvements field is a calculation that adds all the LV Justifications with the Total Site Improvements.

\$3,731.34

\$3,731.34

\$0.00



#### Provide the ability to do a Narrative Appraisal

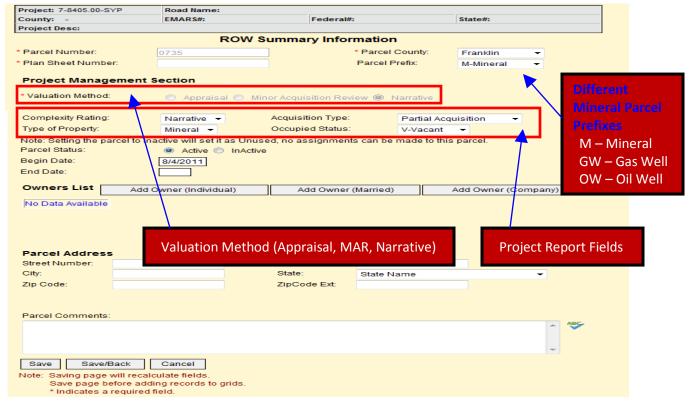
Task 481 - UC02-011 - Provide the ability Add/Maintain a Mineral Parcel.
 A Mineral parcel is a sub-surface parcel and will have a Prefix of GW (Gas Well), OW (Oil Well), or M (Mineral) in the parcel detail name. (See Task 2017)

A Resource Appraisal is a *Narrative* Mineral Appraisal, completed by a Resource Appraiser and uploaded into the RWUMS system. The functionality to create both Surface and Mineral Parcels has been added to the Project Information page. A new page has been added to collect the Information for a Mineral Parcel. **See "Acquisition Data Flow" below** 

#### The steps for a *Narrative* Appraisal are as follows:

- 1. The Valuation Method is defaulted to *Narrative* Appraisal in the ROW Summary page, and cannot be changed.
- 2. Assign a Resource Appraiser to the parcel to do the Narrative Appraisal.
- 3. Do the *Narrative* Appraisal outside of the RWUMS system
- 4. Upload the Narrative Appraisal
- 5. Update the Recapitulation page (Sheet 16) (See Task 2017)
- Set the Appraisal to complete on the Import Documents page.
   Note: Once the Narrative Appraisal has been set to a complete state, Sheet 16 is locked (No updates to the Appraisal can be made).
- 7. District Reviewer completes the Review process or returns the Appraisal to the Appraiser for updates.
- 8. Central Office Reviewer completes the CO Review Section (If Needed)
- 9. The Final Approver approves both the Report and the Review.

**Note:** Once "Final Approval" has been given, the appraisal and Review is in a locked state, no changes can be made to the Review or the Appraisal. Both the Appraisal Report and Appraisal review can be unlocked (both or just the Review) to make modifications to the document. If they are unlocked, the approval process must be done again.



Task 480 – Provide the ability to do a Narrative Appraisal on the ROW Summary.
 By adding a Valuation Method of *Narrative* Appraisal, the appraisal process can follow the Acquisition Data Flow for an appraisals (See "Acquisition Data Flow" below). This would allow a *Narrative* Appraisal process to use the same data flow as a normal Surface Parcel Appraisal.

#### **Business Rules for Valuation Method**

- 1. All Surface Parcels default to a Valuation Method of *Appraisal* to start with.
- 2. The Valuation Method can be changed to *MAR* (Minor Acquisition Review) or *Narrative* Appraisal at any time. **Note:** Assignments are usually not made at this time

**Note:** For every appraiser assigned, a new Appraisal version is created so that each Appraisal has its own container to hold documents associated to that Appraisal.

- 3. If the Valuation Method is set to MAR, it can be changed back to Appraisal. (Based on Owners Request)
- 4. If the Valuation Method is set to Narrative Appraisal, it cannot be set back to Appraisal.
- 5. A *Narrative* Appraisal is a done on a Surface Parcel Appraisal that is complex in nature and requires a more detailed Appraisal. The Valuation Method starts as an *Appraisal* but if it is determined that the Appraisal is complex in nature than a *Narrative* Appraisal is needed.
- 6. A *Narrative* Appraisal is done for a Mineral Parcel. Mineral Appraisals are automatically set to be a *Narrative* Appraisal. (cannot be changed)
- 7. If the Valuation Method is changed from an *Appraisal* to a *Narrative* Appraisal, then the Appraiser needs to be reassigned.

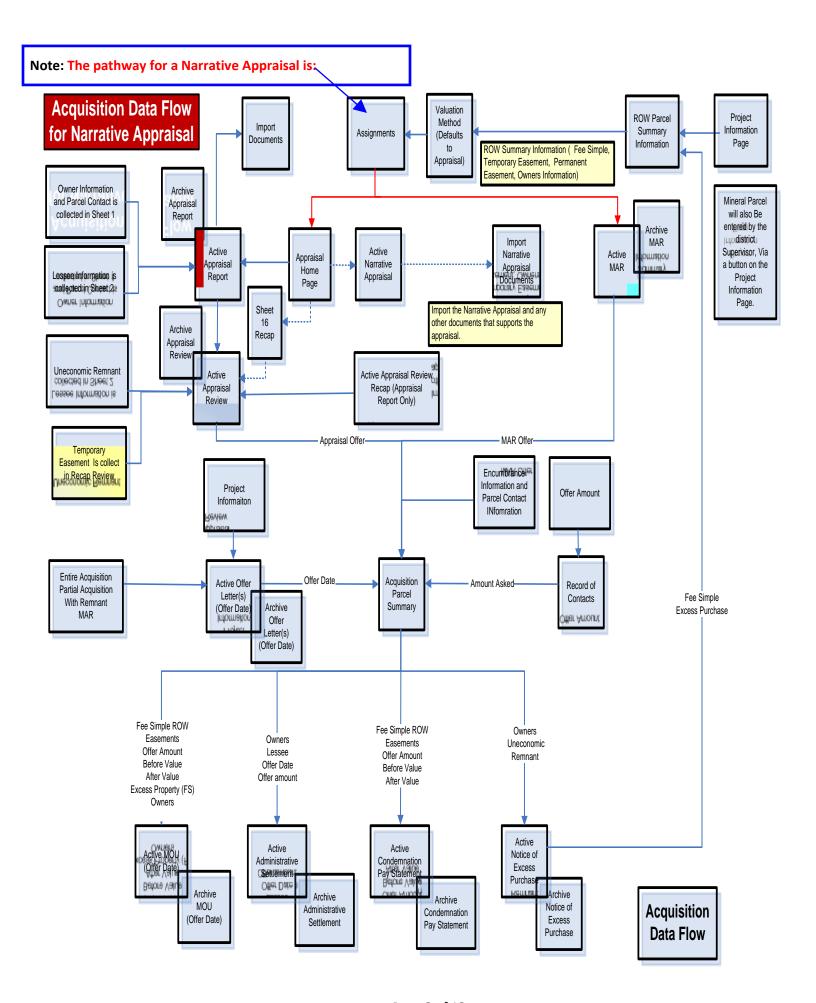
**Note:** Court Narrative Appraisals will not use this process.

#### The steps for a *Narrative* Appraisal are as follows:

- 1. Set the Valuation Method in the ROW Summary page for the parcel to *Narrative* Appraisal.
- 2. Assign an Appraiser to the parcel to do the *Narrative* Appraisal.
- 3. Do the *Narrative* Appraisal outside of the RWUMS system
- 4. Upload the *Narrative* Appraisal
- 5. Update the Recapitulation page (Sheet 16) (See Task 2017)
- 6. Set the Appraisal to complete on the import documents page.

**Note:** Once the *Narrative* Appraisal has been set to a complete state (*On the Import Document Page*), sheet 16 is locked (No updates to the Appraisal can be made).

- 7. District Reviewer completes the Review process or returns the Appraisal to the Appraiser for updates.
- 8. Central Office Reviewer completes the CO Review Section (If Needed)
- The Final Approver approves both the Report and the Review.
   Note: Once "Final Approval" has been given, the Appraisal and Review is in a locked state, no changes can be made to the Review or the Appraisal.
- 10. Both the Appraisal Report and Appraisal review can be unlocked (both or just the Review) to make modifications to the document. If they are unlocked, the approval process must be done again.



Task 482 – Add Valuation Method to the Project Information Parcel Grid
Add Valuation Method and several fields from the Project Report to the Parcel Grid so the Project
Manager can easily see the work needed on the project at a high level. This affects both the SYP and
RWU projects.

This requirement also adds the Valuation Method to the Parcel Leaf on the Tree Folder (A, M, N-S, and N-M) (*Appraisal*, *MAR*, *Narrative* Surface, *Narrative* Mineral). This allows the Valuation Method for the parcel to be seen at a glance.

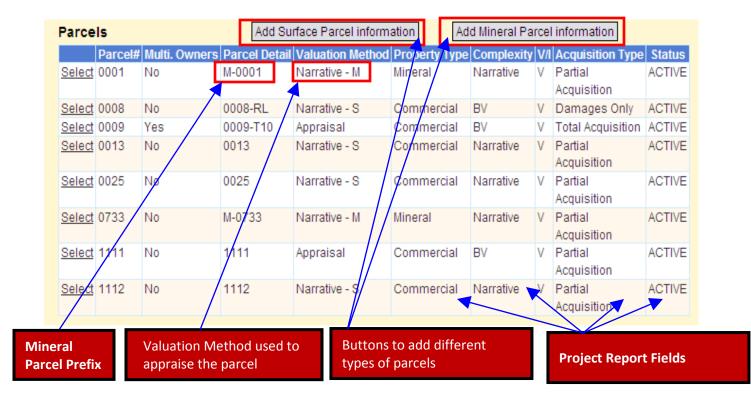
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Add Fields for data collection in the Project Manager section on the ROW Summary page: (And show the fields in the parcel grid) (**Note:** Start of the Project Report) (**See Parcel Grid Above**)

- Valuation Method The method used to appraise the parcel
- Type of Property (Commercial, Residential, Industrial, Rural, Multi-family)
- Complexity Rating (BV (Before Value), BVA (Before + After Value), Minor)
- VI (Vacant, Improved)
- o PT (Partial or Total Acquisition)

#### The Business Rules are as follows

- o The following fields are optional: Type of Property, Complexity Rating, VI, and PT.
- The Appraiser or Acquisition Agent that is assigned to the parcel can update any section of the Parcel ROW Summary. This is because they are the ones usually doing the Project Report.
   Note: A Role will be set up (in the future) for the Unit Leader, which would be a role that would normally do the data entry for the Project Report.
- The Appraiser or Agent cannot set the parcel to inactive, only the Admin, District Supervisor/or Project Manager can set the parcel to inactive
- o Parcel Information cannot be changed on parcels that are not assigned to the Appraiser or Agent.



 Task 2017 - Add a Recapitulation page (Sheet 16) to the Narrative Appraisal process to allow the Appraiser to enter Appraisal Recapitulation information for parcel.

In order for the Appraisal Reviewer to have the ability to pull in detailed information about the parcel, the information needs to be added to the Appraisal Recapitulation. The Appraiser is more familiar with the data so it is best that they enter the information in the Recapitulation page.

This same Functionality is mirrored in the Review Recapitulation page.

Task 613 – Add the ability to add Additional Site Improvements and Buildings to Sheet 16.

(This change affects both Sheet 16 and the Review Recap pages)

Add the ability to Add Site Improvements and Buildings to the Recapitulation page for Both Narrative Appraisals and Normal Appraisals. **Note:** The ability to add Land Classifications was already there. When a normal Appraisal is being worked on this ability will allow addition Site Improvements and Buildings to be added beyond those added in Sheet 2.

On a Narrative Appraisal Sheet 16 in where you add the information that is used by the Review Recapitulation page. The information is pulled in via the select process. New information can be added to the Review Recapitulation without changing Sheet 16 (Recapitulation).

• Task 562 - Provide the ability to create a Narrative Appraisal Review for Mineral Appraisals and Narrative Appraisals.

A Narrative Appraisal will use the same review process as the existing Surface Appraisal Process, which uses a District Review, Central Office Review and Final Approval. The locking and unlocking a Narrative Review will be the same as the existing process. The Appraisal Value is added to the District Reviewers section. Then it is passed forward to the Acquisition Process.

 Task 1708 - Need to remove the Numeric validation from the Condemnation Pay statement for the check number fields.

This Check number field should have been an Alpha Numeric field to allow Central Office to use this field for tracking.

- Task 1658 Allow the District Reviewer to change the Acquisition type
   The District Review needs the ability to change the Acquisition type because of Design changes. This should not affect the setting in the appraisal.
- Task 2306 Users don't need to see deleted Projects & Parcels nor do Appraisers need to see Parcels that are no longer assigned to them in tree folder.



### RWUMS Top 10 Task/Wish List

	Comments for additional functionality and enhancement
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	Submitted By