

# COMPLEX PROJECT MEETING QUICK REFERENCE

## 1. Coordinate PA Existing Project or the Creation of a new Project (within CPA)

- a. When a project already exists in CPA, have the Project Owner add you as a contact with rights to edit so you can create complex project tickets.
- b. If no project exists, you must create a project in CPA. This is simply defining the boundary of your job and specifies basic information about names and dates. Make sure to change the **PROJECT STATUS** to **"IN PROGRESS"** or you will not be able to enter tickets.

## 2. Create a Complex Project Ticket

- a. From within the Project in step one (in CPA on the main screen, find the line showing your project and look to the far right) select create ticket.
- b. From the drop-down menu select COMPLEX PROJECT.
- c. Enter the complex project information. Here you will define the boundary of this complex project ticket notification. It could be the same as the project above or a smaller area, just make sure to include ALL of the proposed construction area. You are able to have multiple complex project tickets within one CPA Project.
- d. Enter the type of work to be performed.
- e. Decide if you want to hold a meeting, if so, select the check box. If not, provide the reason for not holding a meeting.
- f. If a meeting is being held, provide the meeting date, time, and location. Hold the meeting on-site or close by and take into account the travel conditions of those attending. Hold multiple meetings if the project covers a large area. You will also be prompted for your company and contact information. At the end you will be able to submit the ticket (bottom right). Meeting must take place between day 3 to day 20 after the complex project ticket notice is sent out.
- g. Remember that the Excavator is responsible for contacting the Project Owner and designer about the meeting and their requirement to attend.

## 3. Meeting criteria

- i. Only impacted Facility Owners (FO's) are required to attend the meeting.
- ii. Facility Owners can attend in person or electronically.
- iii. If no meeting is being held, Facility Owners can request a one on one meeting with the Excavator.
  1. FO's should immediately respond to the CP Ticket with Karl response (092) requesting a meeting.
  2. The FO's have up to 3 days from the CP ticket notice to contact the Excavator and schedule a meeting.
  3. The FO's must meet with the Excavator no later than the 7<sup>th</sup> day from the CP notice.
  4. The Excavator and FO's should work together to resolve the reason for the meeting.
  5. The FO's locate according to the agreement made.
  6. This will still allow the Excavator to enter routine dig tickets by the end of day 7 so they could start excavation as early as the 10-day constraint.
  7. If excavation on the project has not started within 90 days, a new Complex Project Ticket notification must be created, a new meeting to be held or deemed.

## 4. Complex Project Meetings

- a. Introductions – Introduce your team, project owner, engineer and then have everyone in the meeting provide their information. Excavator takes meeting minutes using the POCS approved template.
- b. Have every attendee sign in and provide **ALL** the information (you must have this to add them as a contact in the system if they want access)

- c. Define the scope of the entire project. Discuss in detail what the project is about and how you plan on executing or constructing. What timeframes do you expect, purpose for the project, what is being constructed, ect. Remember, this process is to develop communication so make sure to communicate.
- d. Define the phases of the project (if used)
- e. Provide plans or drawings of the project to each attendant if possible. The more information you can provide that locators can take with them the better.
- f. Determine the scope of a Ticket
  - i. Inform each FO that modifying the scope of a ticket is permitted as long as all agree. This will benefit everyone.
  - ii. Come to an agreement on the revised scope of a ticket. You can modify the scope of a ticket to anything that you ALL can agree to. (ex. entire project on one ticket, or 1 ticket per 10,000 LF, ect.) If one FO cannot agree, you can separate out their impacted area and come to an agreement with the others. Make sure to identify and document the area of the project where these agreements are made.
    - 1. If no agreement is made with one or more Utilities, the affected area will default back to the standard definition of a ticket scope (1,000 ft or intersection to intersection whichever is greater). Make sure to identify and document the area of the project where this occurs.
- g. Discuss the timeframe for mark outs by Facility Owners if the scope has changed.
  - i. How long to FO's have to mark out the scope of a ticket (only applies if the scope agreement has been modified). Describe and document in detail how many days are given.
- h. Discuss if additional meetings will be held and how everyone will communicate.
  - i. Will additional meeting be held? If so, how often? In person or by conference call? Where are meetings held?
  - ii. Will Utilities contact you on a specific timeframe to check for refreshes or will you enter in CPA?
  - iii. Make sure to document all additional meetings an upload to CPA.
- i. Upload documents
  - i. After the meeting is held, upload all documents obtained and information provided to attendees (Ticket scope, mark out agreement, plans, contact list, ect.)
  - ii. Make sure to add all attendees as contacts to the CP in order for them to gain access, see what you have uploaded, and communicate with all stakeholders.
- j. CPA has a communication tool for all contacts entered, use this to communicate, it all gets recorded.
- k. If an involved Stakeholder fails to attend the meeting, the Excavator may proceed according to the agreement reached at the meeting.

## 5. Entering dig tickets

- a. If no meeting was held, enter dig tickets **WITHIN** CPA Complex Project. When entering tickets, you cannot start excavation prior to the 10<sup>th</sup> day from the Complex Project Ticket (notice sent out). You follow the standard scope of a ticket. At the earliest, tickets can be entered on day 7 so that excavation can start on day 10.
- b. If a meeting was held, enter dig tickets **WITHIN** CPA Complex Project. When entering tickets, you cannot start excavation prior to the 10<sup>th</sup> day from the Complex Project Ticket (notice sent out). Tickets **MUST** be entered according to the agreements made at the meeting. (Example, if you agreed to 10,000 LF scope of a ticket and 5 days to locate, you must enter the ticket with a scope of no more than 10,000 LF and enter the start date at least 5 days from the day the ticket is entered.)
- c. If the scope of your project changes, a NEW Complex Project Notification and meeting will be required. This new CP notification ticket **MUST** be placed within the same PROJECT (Step 1).