

# United States Department of the Interior

## BUREAU OF LAND MANAGEMENT

Montana State Office

5001 Southgate Drive, P.O. Box 36800

Billings, Montana 59107-6800

<http://www.mt.blm.gov/>

In Reply To:

2200 (924.5) P

January 21, 2004

EMAIL TRANSMISSION - 1/21/04  
Instruction Memorandum No. MT-2004-020  
Expires: 9/30/05

To: State Management Team

From: Deputy State Director, Division of Resources

Subject: Requesting Appraisals and Registering Users of the Automated  
Appraisal Request and Review Tracking System (ARRTS)

The centralization of the appraisal function in the Department of the Interior (DOI) became effective by Secretarial Order on November 16, 2003. The appraisal functions for all DOI bureaus/agencies, except BIA, will now be under the Office of Appraisal Services (OAS), consisting of seven regional offices scattered around the country. Montana is in the Mountain Region and will receive support from the Regional Supervisory Appraiser (RSA) located in Denver, Colorado, at the DOI National Business Center (NBC). North Dakota and South Dakota are in the Midwest Region and will receive support from the RSA located in Minneapolis, Minnesota. The NBC developed the ARRTS to provide a common, web-based form for submitting appraisal requests to the new NBC appraisal organization. The functionality of the ARRTS is described in Attachment 1. The purpose of this IM is to provide basic information about how the ARRTS works and how it will be implemented in the Montana/Dakotas BLM.

All future appraisal requests will be submitted through the ARRTS. Appraisal requests will continue to be initiated by the field office (FO) realty staff and must be approved as a FO priority before the request is entered into the ARRTS. A user must be registered in order to submit an appraisal request into ARRTS. Instead of using the self-registration option, we have elected to group register the current realty specialists, their supervisors, and the FO managers in each office as users of the ARRTS; see Attachment 2 for the list of names. We will update the list as needed.

In order to ensure appropriate management oversight and that all appropriate information is included with an appraisal request, all appraisal requests entered into the ARRTS will be forwarded to a State Office (MSO) employee designated under Agency Approvers on Attachment 2. The automated system is not designed to provide all the information that is required before an appraiser begins a particular project, such as preliminary title information,

maps, plats, cultural resources information, environmental site assessment (Hazmat), and copies of draft or existing land use authorizations (rights-of-way, leases, permits). Users will have to provide the applicable information by fax, mail, or hand delivery to the MSO. Also, a parcel information sheet (Attachment 3) must be completed and accompany the other information. The Agency Approvers will not approve a request entered into the ARRTS until all of the appropriate information has been received by the Agency Approvers in MT-924.

With implementing this new process, OAS may choose to use on-board OAS appraisers or contract out the work. In either case, OAS will bill BLM for the appraisal services (appraisers' travel). Therefore, field offices should plan for and cover any costs associated with the requested appraisal work entered into ARRTS.

While implementation of the ARRTS will require us to adjust the process we have used in the past to request appraisals, it is important for all users and approvers to understand that the primary function of the ARRTS is to promote consistent and complete appraisal requests. The ARRTS is not intended to replace the personnel communication and coordination between the FO and the MSO that is required to ensure that the state's realty program priorities are properly addressed. It is also not intended to replace the personal interaction between realty staff, managers, and appraisers that is necessary to avoid or resolve issues and problems that can and do arise as complex realty transactions are processed. We expect the DOI appraisers will continue to be very much a part of the BLM's realty program.

As more information becomes available about the ARRTS and other process changes required by the appraisal centralizations, we will keep you informed. Please direct any questions to Craig Haynes at 406-896-5040.

Signed by: Howard A. Lemm, DSD, Division of Resources

Authenticated by: Kathy Iszler, Staff Assistant (MT-924)

### 3 Attachments

- 1-NBC Interim Appraisal Request and Review Tracking System (4 pp)
- 2-Montana/Dakota's BLM Group Registration for the Appraisal Request System (2 pp)
- 3-Parcel Information Sheet (1 p)

### Distribution w/Attms.

Assistant Field Manager, Havre Field Station  
Assistant Field Manager, Glasgow Field Station  
Kim Klostermeier, OAS, Billings, MT

## **NBC Interim Appraisal Request and Review Tracking System**

The interim Appraisal Request and Review Tracking System was developed to provide a common, web-enabled form for submission of appraisal requests to the new National Business Center (NBC) appraisal organization. In addition, it provides a process for forwarding the request for approval and assignment, and a mechanism for tracking and reporting on appraisal requests. The system is basic and straight-forward and therefore it is not anticipated that training will be necessary. However, a user guide will be made available shortly after implementation of the system, which will be accessible through the "help" feature.

**While the automated tracking system will promote consistent and complete appraisal requests, it is not intended to replace the personal communication and coordination currently in practice within the Bureaus.** Realty projects are much too complex to reduce to a simple form; users and appraisers must continue their personal interaction to ensure that the appropriate information is transmitted to those who need it, that the Bureaus' priorities are properly addressed, and that problems are anticipated and averted or resolved.

Requests will be initiated by the user/realty specialists. Requests will be routed to the Regional Supervisory Appraiser (or delegate) for assignment to a staff or contracted appraiser. Management oversight of appraisal requests will be a Bureau function, and the new organization will assume all requests received are legitimate projects. This interim system accommodates routing for management approval. At the Bureaus' discretion, users may be given request and approval authority if the Bureaus want to by-pass this approval process. This system is only functional with an ID and password in order to protect landowner privacy.

The Chief Appraiser, in consultation with the Regional Supervisory Appraisers, will determine overall workload strategies. However, Bureau and NBC appraisal staff at the field level should work together to address prioritization of specific projects to accommodate agency needs. Early and thorough communication between the Bureaus and appraisal staff should help minimize conflicts in prioritization. However, if difficult situations arise, they will be elevated to the Regional Supervisory Appraisers or Chief Appraiser and corresponding Bureau managers. This system was specifically designed for the submission of appraisal requests. Special appraisal assignments not listed under "Appraisal Product" on the form should be coordinated with the appraisers.

### **Access to the system:**

- The URL for the production application is: <http://ec21.nbc.gov/arrts>.
- Users will be those requesting appraisals, Agency Approvers, Regional Appraisers, and Review Appraisers. Agency Approvers, Regional Appraisers and Review Appraisers must be assigned those roles within the system.
- A user must be registered in order to submit an appraisal request.
- Potential users can self-register on-line through the "registration" feature. However, this will require approval by a site administrator before the user can actually access the system.

- Alternatively, Bureaus can preregister groups of users by providing a spreadsheet containing the required contact and role information; contact Linda Wenri at **(703) 390-6679** for information on the requirements for pre registration.
- The interim Appraisal Request and Review Tracking System is a secure website. In order to access the application, the user must have an Internet browser that supports a high-grade (128-bit SSL) security connection. The application has been tested with Microsoft® Internet Explorer version 6.0.2, Netscape® version 6.2.1, and Netscape® Communicator version 4.78. There is no additional software required.

#### **Submission of an Appraisal Request:**

- Once a user successfully logs into the system, the appraisal request form is displayed. There is also a "New Request" tab that will allow the user to navigate to the request form.
- The user must complete the appraisal request form by selecting the Regional Appraiser and Agency Approver for this request, then providing information about the type of appraisal being requested, the property to be appraised, the owner(s) of the property and other information that the appraiser would need to perform the appraisal. More detailed instruction on what information to include is available under the "help" feature.
- The appraisal request form allows multiple property owners and applicants to be identified.
- The submitter can also upload supporting documents that pertain to this appraisal request. However, if supporting documents cannot be easily uploaded, then they can be faxed, mailed, or delivered by the method currently used. A notation can be made in the "additional information" section to alert the appraisers that these documents will be sent separately.
- Once the submitter has completed and saved the request, a summary of the request will be shown.

#### **Appraisal Request Summary:**

- The appraisal request summary displays the information contained in the request. From the summary page, the submitter has the following options:
  - o "Edit" shows the appraisal request form and allows the submitter to change any of the information on the form.
  - o "Forward" forwards the request to the Agency Approver specified in the "Through" field of the appraisal request; this sends an email to the Agency Approver with notification of the request.
  - o "Print" displays a printable version of the appraisal request.
  - o If there are any attachments associated with this request, "Attachments" displays the list of attachments. Clicking on an attachment title will open the attachment in a new browser window.

#### **Agency Approval of an Appraisal Request:**

- The Agency Approver will receive an email notification of the appraisal request once it has been forwarded by the submitter. The email will contain a link that will take the Approver directly to the request after a successful login.

- After accessing the system using the customized email link and entering user-id and password, the Agency Approver will see a customized view of the request form.
- The Agency Approver can also indicate a priority (emergency, high, routine, or low).
- As stated above, priorities should be established through staff at the field level if possible and elevated if needed.
- The Agency Approver can also attach any additional documents to the request. After entering the required information and saving the request, the appraisal summary page will be displayed, and the Agency Approver can choose to edit, print, view attachments, return the request to the originator after noting a reason for the return, or forward the request to the Regional Appraiser specified in the “To” field.

**Assignment of an Appraisal Request by the Regional Appraiser:**

- Once the appraisal request has been forwarded to the Regional Appraiser by the Agency Approver, the Regional Appraiser will receive an email notification similar to that received by the Agency Approver.
- After accessing the system using the customized email link and entering user-id and password, the Regional Appraiser will see a customized view of the request form, with new fields to assign an appraiser and specify the NBC funding code.
- The Regional Appraiser can also attach any additional documents to the request.
- After entering the required information and saving the request, the appraisal summary page will be displayed. Then, the Regional Appraiser can choose to edit, print, view attachments, return the request to the originator after noting a reason for the return, or forward the request to the assigned Review Appraiser.
- Once the Regional Appraiser forwards the request, email notifications are sent to the assigned appraiser as well as the Agency Approver and the requestor notifying them of the assignment. The appraiser's email will contain a customized link directing them to the request.

**Close out of an Appraisal Assignment by the Review Appraiser**

- After accessing the system using the customized email link and entering user-id and password, the Review Appraiser will see the summary view of the appraisal request. This view allows the Review Appraiser to print the request as well as view any attachments associated with the request.
- The Review Appraiser will edit the request form to enter the approved appraisal result information. The Review Appraiser is also required to attach a copy of the appraisal review.
- Forwarding the request marks the request as complete and sends an email to the Regional Appraiser, Agency Approver and requestor indicating the appraisal has been completed. This is a courtesy notification, the completed appraisal reports and signed review statements remain the formal documentation and support for the value conclusions. They will be sent to the requesting entity through normal methods.

**Search Mechanism:**

- The system also provides a mechanism to search for and view existing appraisal requests. All users, regardless of their assigned roles, may use the search and report features.
- The “Search/Edit tab” displays the search selection criteria form followed by the search results. The search selection criteria allow the user to search for appraisal requests by Regional Appraiser, Agency Approver, Review Appraiser, Requestor, Request Status, State, County and Tract name. Additional search selection criteria may be added if needed. The initial search results show all appraisal requests.
- If the user modifies the search selection criteria, the search results will be updated to show only those appraisal requests that meet the selected criteria.
- If more than ten results meet the criteria, the user can scroll through them in groups of ten.
- For each appraisal request shown in the search results, there will be a link to the appraisal request summary page showing the full appraisal request.
- Users who are part of the forwarding process for a request will be allowed to view all attachments associated with it except for the appraisal review; only users with Regional Appraiser or Review Appraiser roles will be allowed to view the appraisal review.
- Depending on the routing status of the request, users who are part of the forwarding process for the request may be allowed to update the request.

**More information:**

- The application has a “Help” tab which provides basic information about the application and the information required on the appraisal form.
- Changes may be made to the application based on feedback received.
- A User's Guide has been developed and will be available as one of the Help options.
- Contacts

Linda Wenri (703-390-6679), [Linda G Wenri@nbc.gov](mailto:Linda.G.Wenri@nbc.gov)

Sharon Williams (703-390-6698), [Sharon D Williams@nbc.gov](mailto:Sharon.D.Williams@nbc.gov)

**Montana/Dakota's BLM Group Registration  
For the Automated Appraisal Request and Review Tracking System**

<u>Name</u>	<u>Title</u>	<u>Authorization</u>
Kim Prill	Branch Chief (Acting)	Approver
Craig Haynes	Realty Program Leader	Approver, Program Manager
Dee Baxter	Supvr. Realty Specialist	Approver
Sandy Brooks	Field Manager	User
Eddie Bateson	Realty Supervisor	User
Tom Carroll	Realty Specialist	User
Janice MaChipiness	Realty Specialist	User
David McIlnay	Field Manager	User
Fred Wambolt	Realty Supervisor	User
Dalice Landers	Realty Specialist	User
Brian Lynnes	Realty Specialist	User
Pam Wall	Realty Specialist	User
Doug Burger	Field Manager	User
Linda Gisvold	Realty Specislist	User
Marion Atkins	Field Manager	User
Chuck Berdan	Realty Specialist	User
Tim Bozarth	Field Manager	User
Rich Maggio	Realty Supervisor	User
Angela Brown	Realty Specialist	User
Jeff Daugherty	Realty Specialist	User
David Mari	Field Manager	User
Gary E. Slagel	Monument Manager	User
Chuck Otto	Realty Supervisor	User
Loreta Park	Realty Specialist	User
Gail Storfa	Realty Specialist	User
Jodi Camrud	Asst. Field Manager	User
Brandi Hecker	NRS	User

<u>Name</u>	<u>Title</u>	<u>Authorization</u>
Rick Hotaling	Field Manager	User
Steve Hartmann	Realty Supervisor	User
Kelly Acree	Realty Specialist	User
Dave Barney	Realty Specialist	User
Gary Beals	Realty Specialist	User
Susie Williams	Realty Specialist	User
Rich Adams	Asst. Field Manager	User
John Fahlgren	Asst. Field Manager	User
Candy Meyer	Realty Specialist	User
Nancy Anderson	Field Manager	User
Chuck Bridgeman	Realty Supervisor	User
Jim Ledger	Realty Specialist	User

Prepared by CHaynes, 12-15-03

**PARCEL INFORMATION SHEET FOR APPRAISAL REQUESTS**

**ACTION/Serial Number:** ROW \_\_\_\_\_ PERMIT \_\_\_\_\_ LEASE \_\_\_\_\_  
 LAND SALE \_\_\_\_\_ LAND ACQUISITION \_\_\_\_\_  
 LAND EXCHANGE (Name) \_\_\_\_\_  
 PARCEL IDENTIFICATION NUMBER: \_\_\_\_\_ Federal \_\_\_\_\_ NON-Federal \_\_\_\_\_  
**LEGAL DESCRIPTION:** Meridian \_\_\_\_\_ Township \_\_\_\_\_ Range \_\_\_\_\_  
 Section \_\_\_\_\_

---

**ACRES:** \_\_\_\_\_

Vegetation & General Vegetative Type	
Noxious Weeds	
Land Form (Rolling Hills, Flat, etc.)	
Soil Type(s)	
Grazing -- lessee name, address, phone no.; Allotment Name, AUMs	
Range Improvements--- Type and Cost to Lessee	
Wildlife and Fisheries Habitat	
T & E Species	
Surface Water (Creek, Reservoir, Spring Dev.) Water rights?	
Riparian/Wetlands	
Recreation	
Access	
Merchantable Timber	
Geology and Mineral Potential (Mining claims, O&G Leases)	
Hazardous Materials	
Land Use Plan Conformance	
Encumbrances ( ROWs, Permits, unauthorized use)	
Other Comments or Information	

**CONTACTS:**  
**Field Office/Station:** \_\_\_\_\_ **Contact Person:** \_\_\_\_\_  
**Phone No.:** \_\_\_\_\_  
**Access to property: Name:** \_\_\_\_\_ **Address:** \_\_\_\_\_  
**Phone No.:** \_\_\_\_\_