



Everything you need to use and understand the PA One Call Complex Project Process

On July 31, 2019, after several months of negotiating the Complex Project Process, the PA One Call Board of Directors approved the attached Complex Project Policy and Flowchart. NUCA PA's Executive Director, Brenda Reigle, and Armando Ferri, PA One Call Board Director, diligently worked with the PA One Call's Act 50 Committee to make this process clearly defined and workable for excavators and facility owners alike. It was a give and take process to develop a process that worked for all involved.

Please note that only an Excavator can decide not to hold a meeting. The excavator still has the right to say that while the project fits the definition of a Complex Project by law, it is not Complex and therefore not hold a meeting. Even though a meeting is not held, an excavator still must give the Complex Project 10-day notification and place dig tickets through the Coordinate PA Portal (CPA). You also must give your reasoning in the CPA for not declaring a project complex as defined by law.

Finally, keep in mind that a Facility Owner can request a one-on-one meeting with an Excavator, if the Facility owner believes the area is complex because of the number or size of the facilities to be located within the project area. This type of special Facility Owner meeting defaults to standard dig ticket size (One Call definition). You still enter these dig tickets through the CPA since the project is defined as Complex by law. Since you had to start the Complex Project notification process through the CPA, you must continue in this portal to enter your Standard Dig Tickets for this particular Facility Owner.

Please feel free to contact Brenda Reigle at 717-234-8055 or Armando Ferri at mferri@zoominternet.net, if you have specific questions regarding the Complex Project Process as they were directly involved with the negotiating process and can best address your questions.

COMPLEX PROJECT Flowchart for EXCAVATORS

Flowchart

Quick Reference Guide to the Complex Project Process as defined by the Policy below

Flowchart

Rev. 07/2019 Copyright © Pennsylvania One Call System, Inc. This is a PROPRIETARY and CONFIDENTIAL document.

Orange = DESIGNER responsibility
Green = EXCAVATOR responsibility
Yellow = FACILITY OWNER responsibility

Pennsylvania One Call System, Inc.

Complex Project Process Policy

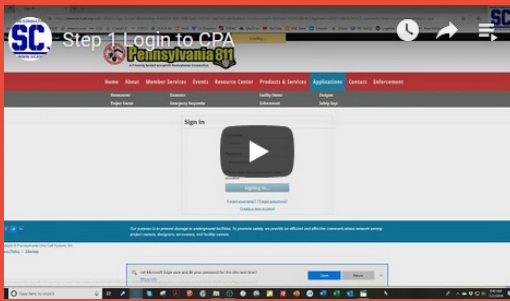
- I. Terms used in this document are as defined in the Underground Utilities Protection Act (UULPA).
 - II. Notifications will be handled through the Pennsylvania One Call System (POCS) Coordinate PA (CPA) Web Portal.
 - A. Designers:
 1. The designer creates a project within the CPA web portal.
 - a. Includes Project Description and proposed timeline.
 - b. Uploads drawings.
 2. Through permissions, the designer assigns access rights (View Only or Modify) to the project owner.
 3. Depending on the timeline of the project, the designer creates at least one Preliminary Design or Final Design notification ticket via the portal, from within the CPA project.
 - a. If multiple excavators will be working on the same project, the designer segments the project into phases based on bid requirements.
 - b. The designer creates at least one Final design ticket for each phase of the project.
 4. When the project moves to construction phase, the project owner or designer assigns access rights (Modify) to the excavator for the phases of the project in which they are involved.
 - B. Excavators:
 1. When a project exists in Coordinate PA:
 - a. The excavator creates a complex project notification ticket via the portal, from within the CPA project, and indicates if a preconstruction meeting is requested. The excavator follows Option 1 or Option 2 below.
 2. When a project does not exist in Coordinate PA:
 - a. The excavator creates a project within CPA.
 - b. The excavator creates a complex project notification ticket via the portal, from within the CPA project, and indicates if a preconstruction meeting is requested. The excavator follows Option 1 or Option 2 below.
- Option 1: When a preconstruction meeting is requested, the excavator establishes the date, time and place of meeting in close proximity to the project work location. Electronic meetings are also acceptable. Meetings are strongly encouraged in the case of complex projects.

Complex Project Policy

Use this policy to further explain the Flowchart above

PA One Call Written Policy

Copyright: PA One Call System



Video Resources

Armando has put together a comprehensive video library for step-by-step instruction

Resources by Armando Ferri - DPC Representative

Copyright: Armando Ferri, Sicavo Consulting, Inc.

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 5 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**

Quick References

Armando has put together a comprehensive documents with more details than the PA One Call Policy noted above

Documents by Armando Ferri - DPC Representative

Copyright: Armando Ferri, Sicavo Consulting, Inc.