Utility Status Report (USR) Guideline

This guideline was developed to help explain the need and history of development and implementation of the USR. The Utility Status Report (USR) is a tool developed by utility coordinators to help communicate realistic schedules. It is designed to be used by all parties including our utility partners.

The following guideline has been broken down into the following processes:

1. History of the USR and the role in modern utility coordination.
2. Utility Conflict Matrix (UCM) & Utility Status Report (USR).
3. Previous versions of the USR & the current USR 3.0.
4. Overview of USR 3.0, standard features
   a. Project Information Sheet (page 4)
   b. Utility Status Report Templates (page 6)
   c. Set-up for a non-reimbursable utility ID (page 6)
   d. Durations Table (page 8)
5. USR 3.0 Production, specific processes
   a. How to report utility cleared during design – All Conflicts Cleared (page 9)
   b. Adding milestones (page 10)
   c. Removing milestones (page 12)
6. Advanced USR 3.0, updating formulas in Excel (page 13)

Process #1 - History of the USR and the role in modern utility coordination

To minimize delays to the roadway contractor the USR was developed in 2018 as a Microsoft Word based tool to facilitate communicate of utility relocation schedules and reduce delays for TxDOT construction projects. Over the years this tool has been adapted as part of the modern utility coordination effort. This tool has been successfully utilized to communicate utility relocation schedules early in the project development life cycle (by 30% PS&E). The USR is required for all Austin District projects to update utility data in TxDOT Connect.

"How did utility coordination evolve to the modern approach we use today?

#1 – Original Approach - Referred to as the steamroller approach, "Here are the project plans, MOVE!" This was a common method of utility coordination prior to development of the ROW 100 & 101 training classes to *identify a more effective process*.

#2 – Revised Approach Next was the imaginary carrot and stick approach, "Here are the conflicts with the project MOVE." This was an improvement because an effort was made to identify conflicts, but there was still a major disconnect from the actual utility relocation process. There was minimal effort made to develop a realistic schedule that utilities could agree with.

#3 – Current Approach Now we utilize **Utility Coordination 2.0**, this strategy is a collaborative effort kicked off at the beginning of the project with the roadway designer, manager, and utility owner or representative. This communication efforts through the lifecycle of the *this modern utility coordination practice.* utility coordination consultant, TxDOT project effort relies on realistic schedules and effective project. *The utility status report is a key tool in*

Process #2 - Utility Conflict Matrix (UCM) & Utility Status Report (USR)

1. The Utility Conflict Matrix (UCM) is an Excel workbook used to evaluate and communicate all conflicts with at roadway project. The UCM is typically developed early in the project development life cycle (by 30% PS&E {or earlier}) and updated throughout the project design process.

   a. Each utility facility within the project limits should be assigned a conflict ID in the UCM and on the existing utility layout.

   b. Each conflict ID is evaluated to determine it the facility is in conflict or not.

   c. Facilities determined to be in conflict are assigned a resolution status "relocation required".

2. Although the UCM is a great tool to communicate utility conflicts, it does not allow for the effort to provide modern utility coordination support regarding communicating realistic schedules.

3. This is where the USR is utilized. If there is at least one utility conflict that may require relocation {Potential Conflict}, the USR can be used to develop a tentative schedule. Later if all conflicts are cleared there is a process to use the USR to report the utility is No Longer in Conflict.

4. Don't confuse the utility ID with a conflict ID from the Utility Conflict Matrix (UCM).

   a. The UCM details the effort for each utility conflict identified.

   b. The USR tracks the schedule for a unique number assigned to a utility owner for a specific project also known as the utility ID.

5. The Austin District has a process for submitting utility IDs including a guideline and utility ID form. It is recommended to check the Austin District standards and guidance web page to ensure you are using the most up-to-date FORM and following the most current guidelines.

6. Why should the TxDOT team develop a schedule for the utility?

   a. Most of the first 5 steps on any utility schedule are assigned to the TxDOT project team; therefore, a utility would need to know when those tasks will be completed before the utility can begin to build a schedule.

   b. This is a great opportunity to provide good customer service and kick-off a collaborative partnership with the utility.

   c. By providing a realistic schedule early in the process the utility and the TxDOT project team kick off the project with a positive collaborative approach.

7. What if the utility disagrees with the schedule provided?

   a. Efforts are made to provide realistic durations for utility assigned tasks, but they can always provide feedback, and we can adjust the schedule.

   b. The goal of this process is to ensure that the schedule being provided to TxDOT by the project team is realistic and utility agrees.

Process #3 – Previous versions of the USR & the current USR 3.0

This version has been developed in Microsoft Excel using formulas and durations (in days) to calculate the next milestone date. If you have ever had to update multiple utility schedules using the content control date selector in Word (previous USR versions), you will appreciate this new version. However, this does require some knowledge of how Excel formulas work when adding and deleting milestones from the appropriate templates. Here are some key concepts that should be considered:
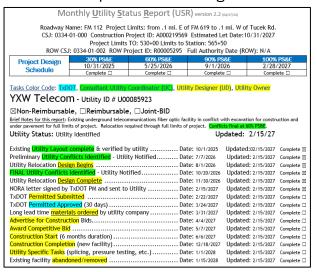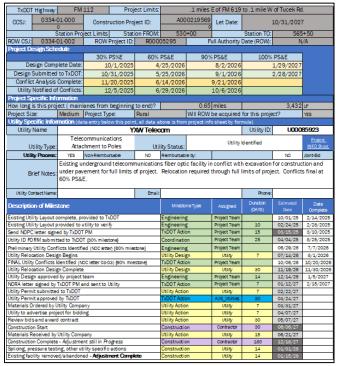
- There is not a need to maintain separate Excel workbooks for each utility instead a separate sheet (tab) should be created for each utility ID.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete	Comments
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		#N/A	1/31/2025	
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/10/25	2/5/2025	
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	02/20/25	2/18/2025	

Project Info | U_0001 | U_0002 | U_0003 | U_0004 | U_0005 | U_0006 | U_0007 | U_0008 | U_0009 | U_0010 | Durations Table | + |

- Here are examples of USRs using the old version (left) and version 3.0 (right) for the same utility.

- IMPORTANT - The USR is a tool used to *look ahead* for a project to communicate a realistic completion date for each utility that must relocate. This tool does track milestones completed, but that is not the primary purpose of this tool. Please note that there may be other status reports submitted to TxDOT that detail actions completed by consultants working for TxDOT. However, the USR should track what is coming up and if we are still on track. The USR was developed for communication with utilities.

- Other status reports submitted to TxDOT may provide detail actions completed by consultants working for TxDOT. *The USR should track what is coming up and if we are still on track.*

- Since each sheet in the Excel workbook is dedicated to a specific utility the schedule; it can be printed to a .pdf and sent as a separate email attachment for confirmation by the utility owner.

- Also, sections of the excel sheet can be pasted directly into the body of an email message as a table in Microsoft Outlook. The recipient (utility) can then edit the data (dates) and send it back.

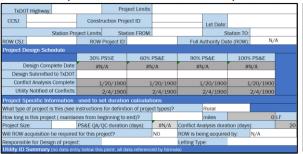## Process #4 – Overview of USR 3.0, standard features

As mentioned before this is an effort to improve the previous versions regarding effort required to update schedules utilizing formulas and durations instead of having to manually revise schedules. Effort has also been made to improve the ability for the TxDOT project manager to understand the data being provided.

1. **Project Information Sheet**
   a. This is where you will input PS&E milestones and the details for the project. Below on the left is a snip from the standard template on the right is from our district example.

   b. Start with the top section of this sheet first, but do not proceed past the Project Specific Information section. The rest of this sheet is programmed to update by formula for the individual utility ID sheets.
      i. When setting up a new USR, start with the project information sheet first.
      ii. Below is the district example project on FM 112 from FM 619 to Tucek Rd. with an anticipated letting date of 10/31/2027

      iii.
      iv. Next input the project design schedule, you will notice the rest of the dates are "N/A"

      v.
      vi. Here is where you will select the type of project {Rural, Urban, or Metro}, enter the length of the TxDOT roadway project (LF calculated by formula), and select the project size {small, medium, or large] (see next page re: Durations table). Once this information is entered the rest of the Project Design Schedule table will calculate by formula.
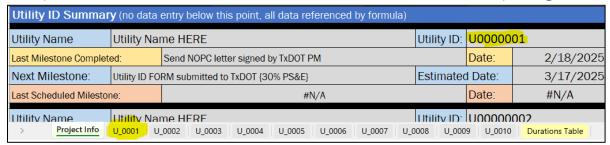

      vii.

viii. Size and type of project can be found on the Durations Table.

TxDOT Project Types	Descriptions based on what is located in the ground for these projects
Rural	roadways with open ditches in less populated areas.
Urban	roadways in more populated area with open ditches, but may have storm sewer at intersections.
Metro	roadways in highly populated area with complex storm sewer and shared use paths.
Project Size	Descriptions based on LF of TxDOT roadway project or units of anticipated utility adjustment
Small	intersection or bridge projects typically <1,000 feet,<10 poles (distribution) 4 (transmission)
Medium	>1,000 feet <1 mile (5,280 feet), >10 poles <20 poles (distribution) 10 (transmission)
Large	>1 mile (5,280 feet), >20 poles (distribution) 11 (transmission)

ix.

x. Once complete the project information data will be available on all the utility ID templates. Any changes that need to be made to the project data can be made here.

TxDOT Highway:	FM 112		Project Limits:		.1 miles E of FM 619 to .1 mile W of Tucek Rd.		
CCSJ:	0334-01-000		Construction Project ID:			Let Date:	10/31/2027
	Station Project Limits		Station FROM:	530+00		Station TO:	565+50
ROW CSJ:	0034-01-02	ROW Project ID:			Full Authority Date (ROW):		N/A
Project Design Schedule							
		30% PS%E	60% PS&E		90% PS&E	100% PS&E	
Design Complete Date:		10/1/2025	4/25/2026		8/2/2026	1/29/2027	
Design Submitted to TxDOT:		10/31/2025	5/25/2026		9/1/2026	2/28/2027	
Conflict Analysis Complete:		11/20/2025	6/14/2026		9/21/2026	3/20/2027	
Utility Notified of Conflicts:		12/5/2025	6/29/2026		10/6/2026	4/4/2027	
Project Specific Information - used to set duration calculations							
What type of project is this (see instructions for definition of project types)?				Rural			
How long is this project (mainlanes from beginning to end)?				0.65 miles		3,432 LF	
Project Size:	Medium	PS&E QA/QC duration (days):		30	Conflict Analysis duration (days):		20
Will ROW acquisition be required for this project?			NO	ROW is being acquired by:		N/A	
Responsible for Design of project:		TxDOT			Letting Type:	Statewide Let	

xi.

xii. The Design Complete date, Conflict Analysis Complete, and Utility Notified of Conflicts are calculated by formula as part of the template. If needed these dates can be manually entered instead of allowing the workbook to calculate by formula.

c. The project information sheet already includes a reference to the 10 non-reimbursable USR examples via formula. The formulas return the utility name, utility ID, last milestone completed, completed date of that milestone, and the next milestone due along with the anticipated due date. See next section for more information on formula updating.

Utility ID Summary (no data entry below this point, all data referenced by formula)			
Utility Name	Utility Name HERE	Utility ID:	U0000001
Last Milestone Completed:	Send NOPC letter signed by TxDOT PM	Date:	2/18/2025
Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}	Estimated Date:	3/17/2025
Last Scheduled Milestone:	#N/A	Date:	#N/A
Utility Name	Utility Name HERE	Utility ID:	U00000002

> Project Info | U_0001 | U_0002 | U_0003 | U_0004 | U_0005 | U_0006 | U_0007 | U_0008 | U_0009 | U_0010 | Durations Table

d.

e. We also added a row for each utility ID to return the **Last Scheduled Milestone**, this will provide a quick reference to the date when all utility conflicts will be clear for this utility.

Utility ID Summary (no data entry below this point, all data referenced by formula)			
Utility Name	XYZ Telecom	Utility ID:	U00025021
Last Milestone Completed:	Send NOPC letter signed by TxDOT PM	Date:	11/1/2025
Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}	Estimated Date:	11/28/2025
Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete	Date:	10/26/2027

f.

Utility Status Report (USR) Guideline
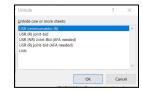
2. **Utility Status Report Templates**
    a. Since over 90% of Austin District projects have utility relocations that are non-reimbursable those templates are the only ones visible. The rest are hidden.
    b. You can right mouse click the sheet names at the bottom of screen to unhide sheets.
        i. There are 4 additional templates available.
        ii. It is required that the project team coordinate directly with a member of the Austin District Engineering Services Utility Section when one of these other templates will be required.
    c. Those additional templates are:
        i. **USR (reimbursable) {R}** This template is for utility adjustments anticipating TxDOT reimbursement. Execution of a standard utility agreement will be required prior to any construction activities. *Example of reimbursable template shown to the right.*
        ii. **USR (reimbursable) {R} joint-bid** This template is for when the utility adjustment will be included in the TxDOT roadway contract, is 100% reimbursable and does not include any elective betterment in the relocation design.
        iii. **USR (not reimbursable) {NR} joint-bid (AFA needed)** This template is for when the utility adjustment will be included in the TxDOT roadway contract (state let), is not reimbursable and the utility must pay 100% of the cost. An Advanced Funding Agreement (AFA) will be required, and payment must be received by TxDOT 45 days prior to letting.
        iv. **USR (reimbursable) {R} joint-bid (AFA needed)** This template is for when the utility adjustment will be included in the TxDOT roadway contract and the utility either has a calculated eligibility ratio that is not 100% or has elected to include betterment in the joint-bid utility work. In this case the amount owed to TxDOT will be calculated in the standard utility agreement (SUA). That amount will be included in the AFA and collected 45 days prior to letting.

3. **Set-up for a non-reimbursable utility ID**
    a. Here is an example for Utility ID 00000001
    b. Follow this process to set-up for a specific utility ID.
        i. We changed the utility name on ROW 16 to **XYZ Telecom** and enter the Utility ID assigned in TxConnect **U00025021**.
        ii. Next, edit the sheet name at the bottom of the workbook to match **XYZ U_25021**.
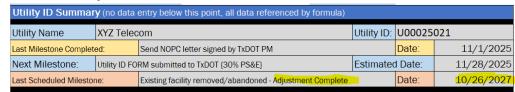   iii. We remove the additional zeros and replace with a "_".
        iv.

c. By following this process, you will notice the formulas on the project information sheet update automatically.

i.

Utility ID Summary (no data entry below this point, all data referenced by formula)				
Utility Name	XYZ Telecom		Utility ID:	U00025021
Last Milestone Completed:	Send NOPC letter signed by TxDOT PM		Date:	11/1/2025
Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}		Estimated Date:	11/28/2025
Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

ii. The formulas for last milestone completed and next milestone update also.

d. Now that we have the sheet and project information sheet linked correctly, we can begin updating the rest of the sheet.

e. For the rest of this example, we used our district example project information to show how to finish out building an initial utility status sheet.

i.

TxDOT Highway:	FM 112		Project Limits:		.1 miles E of FM 619 to .1 mile W of Tucek Rd.		
CCSJ:	0334-01-000 0		Construction Project ID:	0 0	Let Date:	10/31/2027	
	Station Project Limits		Station FROM:	530+00		Station TO:	565+50
ROW CSJ:	0034-01-02		ROW Project ID:	0	Full Authority Date (ROW):	N/A	

Project Design Schedule				
	30% PS%E	60% PS&E	90% PS&E	100% PS&E
Design Complete Date:	10/1/2025	4/25/2026	8/2/2026	1/29/2027
Design Submitted to TxDOT:	10/31/2025	5/25/2026	9/1/2026	2/28/2027
Conflict Analysis Complete:	11/20/2025	6/14/2026	9/21/2026	
Utility Notified of Conflicts:	12/5/2025	6/29/2026	10/6/2026	

Project Specific Information				
How long is this project (mainlanes from beginning to end)?			0.65 miles	3,432 LF
Project Size:	Medium	Project Type:	Rural	Will ROW be acquired for this project? NO

Utility Specific Information (data entry below this point, all data above is from project info sheet by formula)				
Utility Name		XYZ Telecom		Utility ID: U00025021
Utility Type:	Telecommunications Attachment to Poles	Utility Status:	Utility Identified	Project INFO Sheet
Utility Process:	YES Non-Reimbursable	NO Reimbursable by:		NO Joint-Bid
Brief Notes:	02/18/25 - Utility Identified to be within limits of project, existing utility layout to be updated based on Sub-surface utility engineering (SUE) work to be performed. Primary conflict matrix to be developed and shared after 60% milestone deliverable.			
Utility Contact Name: Stefan Srnensky		Email: stefan.srnensky@txdot.gov		Phone: 512-960-7590

ii. As part of the template there are 3 milestones set-up to return the date from the project design schedule. They are:

1. <u>Existing Utility Layout complete, provided to TxDOT</u>, same as 30% PS&E Design Complete Date

2. <u>Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}</u>, calculated based on the 60% PS&E schedule.

3. <u>FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}</u>, calculated based on the 90% PS&E schedule.

4.

Project Design Schedule				
	30% PS%E	60% PS&E	90% PS&E	100% PS&E
Design Complete Date:	10/1/2025	4/25/2026	8/2/2026	1/29/2027
Design Submitted to TxDOT:	10/31/2025	5/25/2026	9/1/2026	2/28/2027
Conflict Analysis Complete:	11/20/2025	6/14/2026	9/21/2026	
Utility Notified of Conflicts:	12/5/2025	6/29/2026	10/6/2026	

5.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		10/01/25	10/3/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	10/13/25	10/16/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	10/31/25	1/1/2025
Utility ID FORM submitted to TxDOT (30% milestone)	Coordination	Project Team	21	01/22/25	
Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		06/29/26	
Utility Relocation Design Begins	Utility Design	Utility	7	07/06/26	
FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		10/06/26	

Utility Status Report (USR) Guideline

f. The programming of formulas was developed to help project teams develop realistic schedules for each utility ID based on project design schedule early in the project development life cycle (30% PS&E).

g.

h. The TxDOT Project Manager may elect to change the utility status report by adding/removing milestones or changing the estimated dates of when milestones are anticipated to be complete. This can be done by entering dates directly in the cell removing the formula.

4. <u>Durations Table</u> this version of the USR also includes a Durations Table help the project team build utility schedules early in the process.

a. This table can be used to estimate the number of days for utility relocation design and utility construction based on utility type, project type, and project size.

b. These are only estimates based on experience from past projects <mark>confirmation with the utility owner or their representatives is required</mark>.

Utility Type	Project Type	Utility Design Duration based on project size			Utility Construction Duration based on project size		
		Small (days)	Medium (days)	Large (days)	Small (days)	Medium (days)	Large (days)
Water/Wastewater	Rural	30	45	90	30	90	120
	Urban	30	60	120	45	120	180
	Metro	45	90	180	90	180	360
Electric (Distribution) aerial on poles	Rural	30	45	60	30	45	45
	Urban	30	45	60	45	60	90
	Metro	45	60	90	45	90	120
Electric (Distribution) underground	Rural	30	45	60	30	60	90
	Urban	45	45	60	45	90	120
	Metro	45	60	90	45	120	180
Electric (Transmission)	Rural	45	60	90	90	120	180
	Urban	45	60	120	120	180	270
	Metro	60	90	180	120	270	365
Gas (Distribution)	Rural	30	45	60	30	45	90
	Urban	45	45	60	45	60	120
	Metro	45	60	90	60	90	180
Gas (Transmission)	Rural	45	45	90	45	60	90
	Urban	60	60	120	60	90	120
	Metro	90	90	180	90	120	180
Telecommunications Attachment to Poles	Rural	30	45	60	30	45	60
	Urban	30	45	60	45	60	90
	Metro	45	60	90	45	90	120
Telecommunications Underground	Rural	30	30	45	30	45	90
	Urban	45	45	60	45	60	120
	Metro	60	60	90	60	90	180
TxDOT Project Types	Descriptions based on what is located in the ground for these projects						
Rural	roadways with open ditches in less populated areas.						
Urban	roadways in more populated area with open ditches, but may have storm sewer at intersections.						
Metro	roadways in highly populated area with complex storm sewer and shared use paths.						
Project Size	Descriptions based on LF of TxDOT roadway project <u>or</u> units of anticipated utility adjustment						
Small	intersection or bridge projects typically <1,000 feet,<10 poles (distribution) 4 (transmission)						
Medium	>1,000 feet <1 mile (5,280 feet), >10 poles <20 poles (distribution) 10 (transmission)						
Large	>1 mile (5,280 feet), >20 poles (distribution) 11 (transmission)						

Utility Status Report (USR) Guideline

Process #5 – USR 3.0 Production, specific processes

How to report utility cleared during design – All Conflicts Cleared

In many cases utility IDs and a Utility Status Report (USR) are developed early in the project life cycle around 30% PS&E. At this point in the development of the project, utilities may be identified to be in conflict or a potential conflict. Later based on changes in design and/or additional Sub-surface Utility Engineering (SUE) efforts it may be determined that these facilities are not in conflict and can remain in place. This process details how to edit the USR to document this change and submit it to TxDOT.

1. For this example, we are going to assume on <u>05/01/25</u>, a Notice of Preliminary Conflicts letter (NOC 03-01 or 03-02) letter was signed by the TxDOT PM and sent to the utility owner.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team			1/29/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/08/25	2/25/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	03/12/25	3/1/2025
Utility ID FORM submitted to TxDOT {30% milestone}	Coordination	Project Team	25	03/26/25	3/24/2025
Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		05/01/25	5/1/2025
Utility Relocation Design Begins	Utility Design	Utility	32	06/02/25	
FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		09/15/25	
Utility Relocation Design Complete	Utility Design	Utility	30	10/15/25	

2.
3. About 1 month later <u>6/02/25</u>, the project team met with the utility owner and based on discussions with the utility and test hole data, the project team was able to clear this utility of all conflicts for this project. Now the next milestone <u>Utility Relocation Design Begins</u> needs to change.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team			1/29/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/08/25	2/25/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	03/12/25	3/1/2025
Utility ID FORM submitted to TxDOT {30% milestone}	Coordination	Project Team	25	03/26/25	3/24/2025
Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		05/01/25	5/1/2025
Utility Relocation Design Begins	Utility Design	Utility	32	06/02/25	
FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		09/15/25	
Utility Relocation Design Complete	Utility Design	Utility	30	10/15/25	

4.
5. Here are the steps to follow for editing this sheet to indicate a utility is No Longer in Conflict.
   a. NOTE – the USR template is a protected sheet. You will need go to the review section in the Ribbon at the top of the screen and select <u>Unprotect Sheet</u>. There is not a password.

   b.
   c. When edits are done, it is recommended to protect the sheet, but **DO NOT** add a password. Leave that field blank and simply hit enter. Once a password is added it cannot be removed.
   d. The milestone <u>Utility Relocation Design Begins</u> can be changed to <u>Utility not in conflict – No Relocation Required,</u> and the rest of the milestones can be deleted.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team			1/29/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/08/25	2/25/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	03/12/25	3/1/2025
Utility ID FORM submitted to TxDOT {30% milestone}	Coordination	Project Team	25	03/26/25	3/24/2025
Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		05/01/25	5/1/2025
Utility not in conflict - NO Relocation Required	Utility Design	Utility	7	06/02/25	

e.

f. Next change the Estimated Date to the date the utility conflicts were cleared 06/02/25. Leave the Date Completed blank. This way the project info sheet will show the update.

Utility Name	Utility Name for U_0010		Utility ID:	U00000010
Last Milestone Completed:	Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}		Date:	5/1/2025
Next Milestone:	Utility not in conflict - NO Relocation Required		Estimated Date:	6/2/2025

g.

Adding milestones

The templates provided are based on experience on past projects; however, each project is unique. This section will cover how to add milestones to an existing schedule to minimize formula errors.

1. For this example, we are going to change the project information that will require adding additional milestones for a non-reimbursable utility. Using the same FM 112 project, except ROW now is being acquired by local government for a statewide let project.

TxDOT Highway:	FM 112		Project Limits:	.1 miles E of FM 619 to .1 mile W of Tucek Rd.		
CCSJ:	0334-01-000	Construction Project ID:			Let Date:	10/31/2027
Station Project Limits		Station FROM:	530+00		Station TO:	565+50
ROW CSJ:	0034-01-02	ROW Project ID:		Full Authority Date (ROW):		N/A

Project Design Schedule				
	30% PS%E	60% PS&E	90% PS&E	100% PS&E
Design Complete Date:	10/1/2025	4/25/2026	8/2/2026	1/29/2027
Design Submitted to TxDOT:	10/31/2025	5/25/2026	9/1/2026	2/28/2027
Conflict Analysis Complete:	11/20/2025	6/14/2026	9/21/2026	3/20/2027
Utility Notified of Conflicts:	12/5/2025	6/29/2026	10/6/2026	4/4/2027

Project Specific Information - used to set duration calculations					
What type of project is this (see instructions for definition of project types)?			Rural		
How long is this project (mainlanes from beginning to end)?			0.65	miles	3,432 LF
Project Size:	Medium	PS&E QA/QC duration (days):	30	Conflict Analysis duration (days):	20
Will ROW acquisition be required for this project?		YES	ROW is being acquired by:	Local Government	
Responsible for Design of project:	TxDOT		Letting Type:	Statewide Let	

2.

3. We will be developing the utility schedule for WXY Electric Coop. Since this is an electric company all ROW parcels will need to be acquired before the poles can be moved to within 3 feet of the proposed ROW line (TAC Rule 21.41).

4. According to the latest update from the Local Government ROW team all parcels should be acquired and clear for construction by 09/30/26. We need to add this milestone in chronological order before ROW 28 and update the formulas.

15	Utility Specific Information (data entry below this point, all data above is from project info sheet by formula)						
16	Utility Name	WXY Electric Cooperative			Utility ID:		S
17	Utility Type:	Telecommunications Attachment to Poles	Utility Status:	Utility Identified			Project INFO Sheet
18	Utility Process:	YES Non-Reimbursable	NO	Reimbursable by:		NO	Joint-Bid
20	Utility Contact Name: Stefan Srnensky		Email: stefan.srnensky@txdot.gov		Phone: 512-960-7590		

21	Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
22	Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		10/01/25	1/20/2025
23	Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	01/30/25	2/2/2025
24	Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	02/17/25	2/14/2025
25	Utility ID FORM submitted to TxDOT {30% milestone}	Coordination	Project Team	25	05/20/25	3/14/2025
26	Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		06/29/26	4/25/2025
27	Utility Relocation Design Begins	Utility Design	Utility	7	05/02/25	5/25/2025
28	FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		10/06/26	
29	Utility Relocation Design Complete	Utility Design	Utility	30	11/05/26	
30	Utility Design approved by project team	Engineering	Project Team	14	11/19/26	

5.

   a. First, click on row 28 and insert a row above.

26	Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		06/29/26	4/25/2025
27	Utility Relocation Design Begins	Utility Design	Utility	7	05/02/25	5/25/2025
28						
29	FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		10/06/26	
30	Utility Relocation Design Complete	Utility Design	Utility	30	11/05/26	
31	Utility Design approved by project team	Engineering	Project Team	14	11/19/26	

   b.

   c. Next, copy ROW 27 from columns A-L and paste in ROW 28.

26	Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		06/29/26	4/25/2025
27	Utility Relocation Design Begins	Utility Design	Utility	7	05/02/25	5/25/2025
28	Utility Relocation Design Begins	Utility Design	Utility	7	06/01/25	5/25/2025
29	FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		10/06/26	
30	Utility Relocation Design Complete	Utility Design	Utility	30	11/05/26	
31	Utility Design approved by project team	Engineering	Project Team	14	11/19/26	

   d.

   e. If you copy and paste from the row above; the Estimated Date formula will not need to be edited. If you copy and paste from the row below; the formula will require editing. See Process #6 - Advanced USR 3.0, Updating Formulas in Excel.

   f. Now change the milestone description for column 28, for this example we used "ROW Acquisition complete - All Parcels CLEAR for Construction" and update the milestone type and team the task is assigned to.

21	Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
22	Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		10/01/25	1/20/2025
23	Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	01/30/25	2/2/2025
24	Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	02/17/25	2/14/2025
25	Utility ID FORM submitted to TxDOT {30% PS&E}	Coordination	Project Team	25	03/11/25	3/14/2025
26	Preliminary Utility Conflicts Identified (NOC letter) {60% PS&E}	Engineering	Project Team		06/29/26	4/25/2025
27	Utility Relocation Design Begins	Utility Design	Utility	7	05/02/25	5/25/2025
28	ROW Acquisition complete - All Parcels CLEAR for Construction	Coordination	Other		09/30/26	
29	FINAL Utility Conflicts Identified (NOC letter 03-03) {90% PS&E}	TxDOT Action	Project Team		10/06/26	
30	Utility Relocation Design Complete	Utility Design	Utility	30	11/05/26	
31	Utility Design approved by project team	Engineering	Project Team	14	11/19/26	
32	NORA letter signed by TxDOT PM and sent to Utility	TxDOT Action	Project Team	7	11/26/26	
33	Utility Permit submitted to TxDOT	Utility Action	Utility	7	12/03/26	
34	Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	30	01/02/27	
35	Materials Ordered by Utility Company	Utility Action	Utility	7	01/09/27	
36	Utility to advertise project for bidding	Utility Action	Utility	7	01/16/27	
37	Review bids and award contract	Utility Action	Utility	30	02/15/27	
38	Construction Start	Construction	Contractor	30	03/17/27	
39	Materials Received by Utility Company	Utility Action	Utility	15	04/01/27	
40	Construction Complete - Adjustment still in Progress	Construction	Contractor	180	09/28/27	
41	Splicing, pressure testing, other utility specific actions	Construction	Utility	14	10/12/27	
42	Existing facility removed/abandoned - Adjustment Complete	Construction	Utility	14	10/26/27	

6. By following this process, the formulas on the Project Information sheet updated automatically.

Utility Name	WXY Electric Cooperative	Utility ID:	U00084599	
Last Milestone Completed:	Utility Relocation Design Begins		Date:	5/25/2025
Next Milestone:	ROW Acquisition complete - All Parcels CLEAR for Construction		Estimated Date:	9/30/2026
Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

7.

Removing milestones

For this example, we have a small adjustment that will be performed by company staff. Milestones for ordering materials, advertising and awarding the contract are not needed.

1. Milestones on ROWS 34, 35 & 36 can be deleted.

	Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
22	Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		10/01/25	1/31/2025
23	Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/10/25	
24	Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	02/25/25	
25	Utility ID FORM submitted to TxDOT {30% milestone}	Coordination	Project Team	25	07/24/26	
26	Preliminary Utility Conflicts Identified (NOC letter) {60% milestone}	Engineering	Project Team		06/29/26	
27	Utility Relocation Design Begins	Utility Design	Utility	7	07/06/26	
28	FINAL Utility Conflicts Identified (NOC letter 03-03) {90% milestone}	TxDOT Action	Project Team		10/06/26	
29	Utility Relocation Design Complete	Utility Design	Utility	30	11/05/26	
30	Utility Design approved by project team	Engineering	Project Team	14	11/19/26	
31	NORA letter signed by TxDOT PM and sent to Utility	TxDOT Action	Project Team	7	11/26/26	
32	Utility Permit submitted to TxDOT	Utility Action	Utility	7	12/03/26	
33	Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	30	01/02/27	
34	Materials Ordered by Utility Company	Utility Action	Utility	7	01/09/27	
35	Utility to advertise project for bidding	Utility Action	Utility	7	01/16/27	
36	Review bids and award contract	Utility Action	Utility	30	02/15/27	
37	Construction Start	Construction	Contractor	30	03/17/27	
38	Materials Received by Utility Company	Utility Action	Utility	15	04/01/27	
39	Construction Complete - *Adjustment still in Progress*	Construction	Contractor	180	09/28/27	
40	Splicing, pressure testing, other utility specific actions	Construction	Utility	14	10/12/27	
41	Existing facility removed/abandoned - **Adjustment Complete**	Construction	Utility	14	10/26/27	

2.
3. After deleting the ROWS, you will notice the formula now has an error.

33	Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	30	01/02/27	
34	Construction Start	Construction	Contractor	30	#REF!	
35	Materials Received by Utility Company	Utility Action	Utility	15	#REF!	
36	Construction Complete - *Adjustment still in Progress*	Construction	Contractor	180	#REF!	
37	Splicing, pressure testing, other utility specific actions	Construction	Utility	14	#REF!	
38	Existing facility removed/abandoned - **Adjustment Complete**	Construction	Utility	14	#REF!	

4.
5. Find a cell like the one on ROW 33 that has the IS Blank formula referencing the cell directly above, then copy and paste on row 34. This will correct the errors.

K33 =IF(ISBLANK(L32),K32+J33,L32+J33)

	A	B	C	D	E	F	G	H	I	J	K	L
30	Utility Design approved by project team						Engineering		Project Team	14	11/19/26	
31	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	11/26/26	
32	Utility Permit submitted to TxDOT						Utility Action		Utility	7	12/03/26	
33	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	30	01/02/27	
34	Construction Start						Construction		Contractor	30	#REF!	
35	Materials Received by Utility Company						Utility Action		Utility	15	#REF!	
36	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	#REF!	
37	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	#REF!	
38	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	#REF!	

6.

K34 =IF(ISBLANK(L33),K33+J34,L33+J34)

	A	B	C	D	E	F	G	H	I	J	K	L
30	Utility Design approved by project team						Engineering		Project Team	14	11/19/26	
31	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	11/26/26	
32	Utility Permit submitted to TxDOT						Utility Action		Utility	7	12/03/26	
33	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	30	01/02/27	
34	Construction Start						Construction		Contractor	30	02/01/27	
35	Materials Received by Utility Company						Utility Action		Utility	15	02/16/27	
36	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	08/15/27	
37	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	08/29/27	
38	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	09/12/27	

7.
8. For more information on how the ISBLANK formula works see next section.

Utility Status Report (USR) Guideline

Process #6 – Advanced USR 3.0, Updating formulas in Excel

In a previous section we covered how to rename a utility ID sheet allowing Excel to update the formula automatically on the project information sheet. In this section we will cover some of the more complex parts of how this tool works.

USR Estimated Date vs. Actual Date formula

1. In the previous Microsoft Word version of the USR there was a content control field for the milestone date, a date when that date was last updated and a check box for when the milestone was complete.

    a.

    b. The current Microsoft Excel version reduces the need for multiple manual updates when a schedule changes, but to properly implement this version we need understand how it is different from the past USR.

    c. We no longer have a completed check box, instead we track the actual date the milestone was completed. This does not change the Estimated date when the milestone was anticipated to be complete.

    d. This way we track the differences (if any) between anticipated dates and actual dates.

2. Understanding the Estimated Date entry and formulas.

    a. Some of the Estimated dates are in cells that are "white" while others are "grey". The cells that are white represent unique data entry or reference a date from the project information section. The cells that are grey are calculated by formula using the duration (in days).

    b. The formula looks uses an IF statement to look if the date completed from the previous milestone is complete. If the milestone complete date IS BLANK it adds the duration (days) to the previous estimated date (column K); however, when an actual date is entered the formula calculates from that date (column L).

3. Here is a sample of that formula from cell K22 =IF(ISBLANK(L21), K21+J22, L21+J22)

	Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
20						
21	Existing Utility Layout complete, provided to TxDOT	Coordination	Project Team		01/12/25	
22	Existing Utility Layout provided to utility to verify	Coordination	Project Team	30	02/11/25	1/31/2025
23	Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	02/15/25	

4. You may notice that some of the calculated dates are dark grey. Conditional formatting was added to each sheet to identify calculate dates that fall on the weekend.

   a. In some cases, we may update the duration (days) for a milestone to move it to a weekday.

   b.

Description of Milestone	Milestone Type	Assigned	Duration	Estimated Date	Date Complete
Utility ID FORM submitted to TxDOT	Coordination	Project Team	25	09/19/25	9/30/2025
Utility Relocation Design Begins	Utility Design	Utility	7	10/07/25	10/20/2025
FINAL Utility Conflicts Identified (NOC letter 03-03)	TxDOT Action	Project Team		#N/A	11/15/2025
Utility Relocation Design Complete	Utility Design	Utility	30	12/15/25	5/1/2026
Utility Design approved by project team	Engineering	Project Team	14	05/15/26	
NORA letter signed by TxDOT PM and sent to Utility	TxDOT Action	Project Team	7	05/22/26	
Utility Permit submitted to TxDOT	Utility Action	Utility	7	05/29/26	
Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	30	06/28/26	
Materials Ordered by Utility Company	Utility Action	Utility	7	07/05/26	
Utility to advertise project for bidding	Utility Action	Utility	7	07/12/26	

   c. For example, changing the duration for Utility Permit approved by TxDOT to 31 days, adjusts the schedule to Monday; therefore, that date is no longer on a weekend.

   d.

Description of Milestone	Milestone Type	Assigned	Duration	Estimated Date	Date Complete
Utility ID FORM submitted to TxDOT	Coordination	Project Team	25	09/19/25	9/30/2025
Utility Relocation Design Begins	Utility Design	Utility	7	10/07/25	10/20/2025
FINAL Utility Conflicts Identified (NOC letter 03-03)	TxDOT Action	Project Team		#N/A	11/15/2025
Utility Relocation Design Complete	Utility Design	Utility	30	12/15/25	5/1/2026
Utility Design approved by project team	Engineering	Project Team	14	05/15/26	
NORA letter signed by TxDOT PM and sent to Utility	TxDOT Action	Project Team	7	05/22/26	
Utility Permit submitted to TxDOT	Utility Action	Utility	7	05/29/26	
Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	31	06/29/26	
Materials Ordered by Utility Company	Utility Action	Utility	7	07/06/26	
Utility to advertise project for bidding	Utility Action	Utility	7	07/13/26	

Adding/Deleting milestones

The templates have been created to serve as a good starting point; however, each project is unique and may require additional milestones to be added or removed. In this section we will explore how to add milestones, remove milestones from the template and update the formulas.

1. For this example, we will use the template for U_0005. This template represents that the utility has been notified of final conflicts, and the utility has completed relocation design.

2. As part of the design the utility realized that a City of Austin (COA) general permit will also be required for this relocation for work done outside of TxDOT ROW. We need to update the schedule to incorporate the COA permit process and how it will impact construction completion.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		10/01/25	2/14/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/24/25	2/28/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	03/15/25	3/10/2025
Utility ID FORM submitted to TxDOT [30% milestone]	Coordination	Project Team	25	10/25/25	8/25/2025
Preliminary Utility Conflicts Identified (NOC letter) [60% milestone]	Engineering	Project Team		06/29/26	9/30/2025
Utility Relocation Design Begins	Utility Design	Utility	7	10/07/25	10/20/2025
FINAL Utility Conflicts Identified (NOC letter 03-03) [90% milestone]	TxDOT Action	Project Team		10/06/26	11/15/2025
Utility Relocation Design Complete	Utility Design	Utility	30	12/15/25	5/1/2026
Utility Design approved by project team	Engineering	Project Team	14	05/15/26	
NORA letter signed by TxDOT PM and sent to Utility	TxDOT Action	Project Team	7	05/22/26	
Utility Permit submitted to TxDOT	Utility Action	Utility	7	05/29/26	
Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	31	06/29/26	
Materials Ordered by Utility Company	Utility Action	Utility	7	07/06/26	
Utility to advertise project for bidding	Utility Action	Utility	7	07/13/26	
Review bids and award contract	Utility Action	Utility	30	08/12/26	
Construction Start	Construction	Contractor	30	09/11/26	
Materials Received by Utility Company	Utility Action	Utility	15	09/26/26	
Construction Complete - Adjustment still in Progress	Construction	Contractor	180	03/25/27	
Splicing, pressure testing, other utility specific actions	Construction	Utility	14	04/08/27	
Existing facility removed/abandoned - Adjustment Complete	Construction	Utility	14	04/22/27	

3. First, we will insert a row directly above the next incomplete milestone.

a.

29	Utility Relocation Design Complete					Utility Design		Utility	30	12/15/25	5/1/2026
30											
31	Utility Design approved by project team					Engineering		Project Team	14	05/15/26	
32	NORA letter signed by TxDOT PM and sent to Utility					TxDOT Action		Project Team	7	05/22/26	

b. Next copy the row below from columns A-L and paste in the new row.

c.

	A	B	C	D	E	F	G	H	I	J	K	L
30	Utility Design approved by project team						Engineering		Project Team	14	11/29/25	
31	Utility Design approved by project team						Engineering		Project Team	14	05/15/26	
32	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	05/22/26	

d. Next, change the description of the milestone to something like "Submit City of Austin General Permit". Also change the Milestone type and assigned team.

e.

	A	B	C	D	E	F	G	H	I	J	K	L
29	Utility Relocation Design Complete						Utility Design		Utility	30	12/15/25	5/1/2026
30	Submit City of Austin General Permit						Utility Action		Utility	14	11/29/25	
31	Utility Design approved by project team						Engineering		Project Team	14	05/15/26	
32	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	05/22/26	

f. The formula for this new milestone and the one below it will need to be updated.

   i. Currently the formula in cell K30 is referencing ROW 28 instead of ROW 29.

   ii.

   K30 f_x =IF(ISBLANK(L28),K28+J30,L28+J30)

	A	B	C	D	E	F	G	H	I	J	K	L
28	FINAL Utility Conflicts Identified (NOC letter 03-03)						TxDOT Action		Project Team		#N/A	11/15/2025
29	Utility Relocation Design Complete						Utility Design		Utility	30	12/15/25	5/1/2026
30	Submit City of Austin General Permit						Utility Action		Utility	14	11/29/25	
31	Utility Design approved by project team						Engineering		Project Team	14	05/15/26	
32	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	05/22/26	

   iii. The formula in cell K31 is similarly referencing ROW 29 instead of ROW 30.

   iv.

   K31 f_x =IF(ISBLANK(L29),K29+J31,L29+J31)

	A	B	C	D	E	F	G	H	I	J	K	L
28	FINAL Utility Conflicts Identified (NOC letter 03-03)						TxDOT Action		Project Team		#N/A	11/15/2025
29	Utility Relocation Design Complete						Utility Design		Utility	30	12/15/25	5/1/2026
30	Submit City of Austin General Permit						Utility Action		Utility	14	11/29/25	
31	Utility Design approved by project team						Engineering		Project Team	14	05/15/26	
32	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	05/22/26	

   v. The easiest fix is to go up to ROW 29 and copy the formula from K29 to K30 & K31.

   vi.

   K29 f_x =IF(ISBLANK(L28),K28+J29,L28+J29)

	A	B	C	D	E	F	G	H	I	J	K	L
28	FINAL Utility Conflicts Identified (NOC letter 03-03)						TxDOT Action		Project Team		#N/A	11/15/2025
29	Utility Relocation Design Complete						Utility Design		Utility	30	12/15/25	5/1/2026
30	Submit City of Austin General Permit						Utility Action		Utility	14	11/29/25	
31	Utility Design approved by project team						Engineering		Project Team	14	05/15/26	
32	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	05/22/26	

   vii. This fixes our formula issue; however, we still have an issue with the schedule.

   viii.

	A	B	C	D	E	F	G	H	I	J	K	L
28	FINAL Utility Conflicts Identified (NOC letter 03-03)						TxDOT Action		Project Team		#N/A	11/15/2025
29	Utility Relocation Design Complete						Utility Design		Utility	30	12/15/25	5/1/2026
30	Submit City of Austin General Permit						Utility Action		Utility	14	05/15/26	
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	06/05/26	

4. Next, we need to add the milestone when the General Permit will be approved and capture how that will change the construction start and completion dates.

   a. Following a similar process as outlined in the previous section we added a row above ROW 32 and created a milestone "City of Austin General Permit APPROVED."

   b. You may notice we color coded these 2 milestones and right justified for clarity.

c.

| K32 | ⌄ | : | × ✓ fx ⌄ | =IF(ISBLANK(L30),K30+J32,L30+J32) |

	A	B	C	D	E	F	G	H	I	J	K	L
28	FINAL Utility Conflicts Identified (NOC letter 03-03)						TxDOT Action		Project Team		#N/A	11/15/2025
29	Utility Relocation Design Complete						Utility Design		Utility	30	12/15/25	5/1/2026
30	Submit City of Austin General Permit						Utility Action		Utility	14	05/15/26	
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	City of Austin General Permit APPROVED						Utility Action		Utility	270	02/09/27	
33	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	02/16/27	

    d. The formula in cell K32 is looking at ROW 30 and calculating 270 days duration (9 months) from 05/15/26 to return the date of 02/09/27.

5. Here is the revised schedule. As you may notice the construction completion date changed from 04/2027 to 01/2028.

    a. This is why identifying critical milestones like this early is important.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		#N/A	2/14/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	02/24/25	2/28/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	03/15/25	3/10/2025
Preliminary Utility Conflicts Identified (NOC letter)	Engineering	Project Team		#N/A	8/25/2025
Utility ID FORM submitted to TxDOT	Coordination	Project Team	25	09/19/25	9/30/2025
Utility Relocation Design Begins	Utility Design	Utility	7	10/07/25	10/20/2025
FINAL Utility Conflicts Identified (NOC letter 03-03)	TxDOT Action	Project Team		#N/A	11/15/2025
Utility Relocation Design Complete	Utility Design	Utility	30	12/15/25	5/1/2026
Submit City of Austin General Permit	Utility Action	Utility	14	05/15/26	
Utility Design approved by project team	Engineering	Project Team	14	05/29/26	
City of Austin General Permit APPROVED	Utility Action	Utility	270	02/09/27	
NORA letter signed by TxDOT PM and sent to Utility	TxDOT Action	Project Team	7	02/16/27	
Utility Permit submitted to TxDOT	Utility Action	Utility	7	02/23/27	
Utility Permit approved by TxDOT	TxDOT Action	AUS_Utilities	31	03/26/27	
Materials Ordered by Utility Company	Utility Action	Utility	7	04/02/27	
Utility to advertise project for bidding	Utility Action	Utility	7	04/09/27	
Review bids and award contract	Utility Action	Utility	30	05/09/27	
Construction Start	Construction	Contractor	30	06/08/27	
Materials Received by Utility Company	Utility Action	Utility	15	06/23/27	
Construction Complete - *Adjustment still in Progress*	Construction	Contractor	180	12/20/27	
Splicing, pressure testing, other utility specific actions	Construction	Utility	14	01/03/28	
Existing facility removed/abandoned - **Adjustment Complete**	Construction	Utility	14	01/17/28	

    b.

6. To delete a milestone the process is similar regarding copying and pasting formulas.

    a. We will use this same schedule for this example. In this case we will assume the utility is no longer planning to advertise and award this work to a contractor instead they will perform the work with inhouse crews due to delays with City of Austin permitting.

| A37 | ⌄ | : | × ✓ fx ⌄ | Utility to advertise project for bidding |

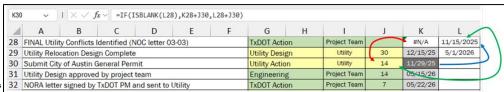|	A	B	C	D	E	F	G	H	I	J	K	L
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	City of Austin General Permit APPROVED						Utility Action		Utility	270	02/09/27	
33	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	02/16/27	
34	Utility Permit submitted to TxDOT						Utility Action		Utility	7	02/23/27	
35	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	31	03/26/27	
36	Materials Ordered by Utility Company						Utility Action		Utility	7	04/02/27	
37	Utility to advertise project for bidding						Utility Action		Utility	7	04/09/27	
38	Review bids and award contract						Utility Action		Utility	30	05/09/27	
39	Construction Start						Construction		Contractor	30	06/08/27	
40	Materials Received by Utility Company						Utility Action		Utility	15	06/23/27	
41	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	12/20/27	
42	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	01/03/28	
43	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	01/17/28	

    b.

    c. When you delete ROW 37 & 38, it will create a formula error for K39 that is now K37.

K37 | =IF(ISBLANK(#REF!),#REF!+J37,#REF!+J37)

	A	B	C	D	E	F	G	H	I	J	K	L
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	City of Austin General Permit APPROVED						Utility Action		Utility	270	02/09/27	
33	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	02/16/27	
34	Utility Permit submitted to TxDOT						Utility Action		Utility	7	02/23/27	
35	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	31	03/26/27	
36	Materials Ordered by Utility Company						Utility Action		Utility	7	04/02/27	
37	Construction Start						Construction		Contractor	30	#REF!	
38	Materials Received by Utility Company						Utility Action		Utility	15	#REF!	
39	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	#REF!	
40	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	#REF!	
41	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	#REF!	

d.

e. Go to the next cell with a working formula that references the row directly above, copy & paste that formula into K37. The rest of the rows will update automatically.

K36 | =IF(ISBLANK(L35),K35+J36,L35+J36)

	A	B	C	D	E	F	G	H	I	J	K	L
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	City of Austin General Permit APPROVED						Utility Action		Utility	270	02/09/27	
33	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	02/16/27	
34	Utility Permit submitted to TxDOT						Utility Action		Utility	7	02/23/27	
35	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	31	03/26/27	
36	Materials Ordered by Utility Company						Utility Action		Utility	7	04/02/27	
37	Construction Start						Construction		Contractor	30	#REF!	
38	Materials Received by Utility Company						Utility Action		Utility	15	#REF!	
39	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	#REF!	
40	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	#REF!	
41	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	#REF!	

f.

g. Here you can see the schedule is back in chronological order.

K37 | =IF(ISBLANK(L36),K36+J37,L36+J37)

	A	B	C	D	E	F	G	H	I	J	K	L
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	City of Austin General Permit APPROVED						Utility Action		Utility	270	02/09/27	
33	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	02/16/27	
34	Utility Permit submitted to TxDOT						Utility Action		Utility	7	02/23/27	
35	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	31	03/26/27	
36	Materials Ordered by Utility Company						Utility Action		Utility	7	04/02/27	
37	Construction Start						Construction		Contractor	30	05/02/27	
38	Materials Received by Utility Company						Utility Action		Utility	15	05/17/27	
39	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	11/13/27	
40	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	11/27/27	
41	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	12/11/27	

h.

i. If you do not want dates to fall on a weekend you can update the duration for construction start from 30 days to 32 days.

J38 | 15

	A	B	C	D	E	F	G	H	I	J	K	L
31	Utility Design approved by project team						Engineering		Project Team	14	05/29/26	
32	City of Austin General Permit APPROVED						Utility Action		Utility	270	02/09/27	
33	NORA letter signed by TxDOT PM and sent to Utility						TxDOT Action		Project Team	7	02/16/27	
34	Utility Permit submitted to TxDOT						Utility Action		Utility	7	02/23/27	
35	Utility Permit approved by TxDOT						TxDOT Action		AUS_Utilities	31	03/26/27	
36	Materials Ordered by Utility Company						Utility Action		Utility	7	04/02/27	
37	Construction Start						Construction		Contractor	32	05/04/27	
38	Materials Received by Utility Company						Utility Action		Utility	15	05/19/27	
39	Construction Complete - *Adjustment still in Progress*						Construction		Contractor	180	11/15/27	
40	Splicing, pressure testing, other utility specific actions						Construction		Utility	14	11/29/27	
41	Existing facility removed/abandoned - **Adjustment Complete**						Construction		Utility	14	12/13/27	

j.

Project Information Sheet

This sheet includes a reference to the individual utility ID sheets by formula. When creating additional sheets follow the following procedure to minimize the need to edit and re-write formulas. For those with Excel experience we have included the logic behind how these formulas work.

1. An XLOOKUP formula is used to find the date of the last milestone with a **<u>date completed</u>** entry.

   a.

   K21 `=XLOOKUP(TRUE,XYZ_U_25021!$L$22:$L$41<>"",XYZ_U_25021!L$22:$L$41,,,-1)`

	A	B	C	D	E	F	G	H	I	J	K	L
20	Utility Name		XYZ Telecom						Utility ID:	U00025021		
21	Last Milestone Completed:			Send NOPC letter signed by TxDOT PM						Date:		11/1/2025
22	Next Milestone:		Utility ID FORM submitted to TxDOT {30% PS&E}						Estimated Date:			11/28/2025
23	Last Scheduled Milestone:			Existing facility removed/abandoned - Adjustment Complete					Date:			10/26/2027

   b.

Description of Milestone	Milestone Type	Assigned	Duration (DAYS)	Estimated Date	Date Complete
Existing Utility Layout complete, provided to TxDOT	Engineering	Project Team		10/01/25	10/3/2025
Existing Utility Layout provided to utility to verify	Engineering	Project Team	10	10/13/25	10/16/2025
Send NOPC letter signed by TxDOT PM	TxDOT Action	Project Team	15	10/31/25	11/1/2025
Utility ID FORM submitted to TxDOT {30% PS&E}	Coordination	Project Team	27	11/28/25	

2. This date is used to find the matching description of last milestone completed.

   a.

	Utility Name	XYZ Telecom		Utility ID:	U00025021
20	Utility Name	XYZ Telecom		Utility ID:	U00025021
21	Last Milestone Completed:	Send NOPC letter signed by TxDOT PM		Date:	11/1/2025
22	Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}		Estimated Date:	11/28/2025
23	Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

   b.

   D21 `=XLOOKUP(K21,XYZ_U_25021!$L$22:$L$41,XYZ_U_25021!$A$22:$A$41)`

	A	B	C	D	E	F	G	H	I	J	K	L
20	Utility Name		XYZ Telecom						Utility ID:	U00025021		
21	Last Milestone Completed:			Send NOPC letter signed by TxDOT PM						Date:		11/1/2025
22	Next Milestone:		Utility ID FORM submitted to TxDOT {30% PS&E}						Estimated Date:			11/28/2025
23	Last Scheduled Milestone:			Existing facility removed/abandoned - Adjustment Complete					Date:			10/26/2027

3. Next, the last milestone completed description is used to find the next milestone description.

   a.

	Utility Name	XYZ Telecom		Utility ID:	U00025021
20	Utility Name	XYZ Telecom		Utility ID:	U00025021
21	Last Milestone Completed:	Send NOPC letter signed by TxDOT PM		Date:	11/1/2025
22	Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}		Estimated Date:	11/28/2025
23	Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

   b.

   C22 `=INDEX(XYZ_U_25021!$A$22:$A$41,MATCH('Project Info'!D21,XYZ_U_25021!$A$22:$A$41,0)+1)`

	A	B	C	D	E	F	G	H	I	J	K	L
20	Utility Name		XYZ Telecom						Utility ID:	U00025021		
21	Last Milestone Completed:		Send NOPC letter signed by TxDOT PM							Date:		11/1/2025
22	Next Milestone:		Utility ID FORM submitted to TxDOT {30% PS&E}						Estimated Date:			11/28/2025
23	Last Scheduled Milestone:			Existing facility removed/abandoned - Adjustment Complete					Date:			10/26/2027

4. After that the estimate date of the next milestone is identified by formula.

   a.

20	Utility Name	XYZ Telecom		Utility ID:	U00025021
21	Last Milestone Completed:	Send NOPC letter signed by TxDOT PM		Date:	11/1/2025
22	Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}		Estimated Date:	11/28/2025
23	Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

   b.

   K22 f_x =XLOOKUP(C22,XYZ_U_25021!$A$22:$A$41,XYZ_U_25021!$K$22:$K$41)

	A	B	C	D	E	F	G	H	I	J	K	L
20	Utility Name		XYZ Telecom						Utility ID:	U00025021		
21	Last Milestone Completed:		Send NOPC letter signed by TxDOT PM						Date:		11/1/2025	
22	Next Milestone:		Utility ID FORM submitted to TxDOT {30% PS&E}						Estimated Date:		11/28/2025	
23	Last Scheduled Milestone:		Existing facility removed/abandoned - Adjustment Complete						Date:		10/26/2027	

5. The last scheduled milestone date is returned using a MAX formula searching the column and returning the latest date in the range.

   a.

20	Utility Name	XYZ Telecom		Utility ID:	U00025021
21	Last Milestone Completed:	Send NOPC letter signed by TxDOT PM		Date:	11/1/2025
22	Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}		Estimated Date:	11/28/2025
23	Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

   b.

   K23 f_x =MAX(XYZ_U_25021!$K$22:$K$41)

	A	B	C	D	E	F	G	H	I	J	K	L
20	Utility Name		XYZ Telecom						Utility ID:	U00025021		
21	Last Milestone Completed:		Send NOPC letter signed by TxDOT PM						Date:		11/1/2025	
22	Next Milestone:		Utility ID FORM submitted to TxDOT {30% PS&E}						Estimated Date:		11/28/2025	
23	Last Scheduled Milestone:		Existing facility removed/abandoned - Adjustment Complete						Date:		10/26/2027	

   c. For this formula to work properly the range must include all the rows (22-41) and all milestones must have an estimated date (by formula or data entry).

6. Finally, the last schedule milestone is returned by finding the milestone description that matches the latest date on the schedule.

   a.

20	Utility Name	XYZ Telecom		Utility ID:	U00025021
21	Last Milestone Completed:	Send NOPC letter signed by TxDOT PM		Date:	11/1/2025
22	Next Milestone:	Utility ID FORM submitted to TxDOT {30% PS&E}		Estimated Date:	11/28/2025
23	Last Scheduled Milestone:	Existing facility removed/abandoned - Adjustment Complete		Date:	10/26/2027

   b.

   D23 f_x =XLOOKUP(K23,XYZ_U_25021!$K$22:$K$41,XYZ_U_25021!$A$22:$A$41)

	A	B	C	D	E	F	G	H	I	J	K	L
20	Utility Name		XYZ Telecom						Utility ID:	U00025021		
21	Last Milestone Completed:		Send NOPC letter signed by TxDOT PM						Date:		11/1/2025	
22	Next Milestone:		Utility ID FORM submitted to TxDOT {30% PS&E}						Estimated Date:		11/28/2025	
23	Last Scheduled Milestone:		Existing facility removed/abandoned - Adjustment Complete						Date:		10/26/2027	

Closing Comments

The Utility Status Report is a required tool for the Austin District that has been designed to be a resource for all district projects. Not all features of this tool will be needed for all projects. The project information sheet with the Utility ID summary is a feature we added, but it may not be needed for all projects.

If you have any suggestions for this tool or any questions regarding implementation, please feel free to reach out to us. Email is preferred. Please send to **AUS_Utilties@txdot.gov**.

Also, if you are working on a project and would like to schedule a workshop with the Austin District Engineering Services Utility Section to help you set-up the project USR we can do that. Please work with the TxDOT design project manager to schedule the workshop.