Instructions

The instructions presented in this document shall be followed by all Third Party Contractors regarding the Correspondence Log. This log is used to track all pertinent correspondence between Metra, the Third Party Contractor, and any other parties involved with the project. Other parties that can be involved in a project include; other operating railroads (UP, BNSF, etc), communities, and other agencies (IDOT, ISTHA, etc).

The correspondence that should be tracked includes letters, memos, faxes, transmittals, e-mails, etc between parties. All letters printed on corporate letterhead sent between parties shall be logged. Internal memos written by the Third Party Contractor to project team staff should be documented. Faxes and transmittals sent between parties shall be logged. Certain e-mails shall also be tracked. All e-mails that transmit attachments shall be logged, as well as e-mails where direction to the Third Party Contractor is being provided by Metra; or direction by the Third Party Contractor to its sub-contractors. Trivial e-mails, such as when someone is available to attend a meeting, do not need to be logged.

Third Party Contractors shall insert their own company logo in place of the Metra logo in the upper left-hand corner of the log.

This form, and any associated documentation, shall be turned over to Metra as a part of the project closeout. All documents shall be scanned and submitted to Metra via an electronic storage method as specified by Metra.

Follow the directions on the subsequent pages for entering data into the Correspondence Log. The log shall be kept current at all times. All columns shall have the required entries without any blanks.

Notes:

1. To insert the Third Party logo, go to Page Setup in MS-Excel, click on the Custom Header button under the Header/Footer Tab, use the Insert Picture button and Format Picture button to insert and size the new logo in the Left Section of the Header.
2. Rows may be added as necessary to accommodate all correspondence on the project.
3. Row heights shall be adjusted so that all text is readable when printed.
4. Rows 1 - 5 of the Correspondence Log are setup to repeat at the top of each page when printed.
5. The general layout of the form has been established by Metra and shall not be altered by the Third Party Contractor.

Instructions

Notes	Description
Note 1	Enter the project name.
Note 2	Enter the Metra Project Number or PPN (Project Package Number applies to Capital Delivery Projects).
Note 3	Enter the contract number.
Note 4	Enter the task number, if applicable.
Note 5	Enter the name of the Third Party Contractor that is maintaining the log.
Note 6	Enter the name of Metra's Project Manager/Construction Manager.
Note 7	Enter the correspondence number. This is a sequential number beginning with 0001.
Note 8	Enter the date that the correspondence was sent or received.
Note 9	Enter the name of the company receiving the correspondence.
Note 10	Enter the name of the individual who received the correspondence.
Note 11	Enter the name of the company sending the correspondence.
Note 12	Enter the name of the individual who sent the correspondence.
Note 13	Enter the type of correspondence being logged. Use the 3-letter code described in the Metra Project File Naming and Directory Structure Instructions.
Note 14	Enter a description for the correspondence being logged.
Note 15	Enter any important additional information in the notes column. Enter N/A if there are no notes.
Note 16	Enter the initials of the person logging the correspondence.

Project Name: Note 1

Project # PPN: Note 2   **Contract #:** Note 3   **Task #:** Note 4

Third Party Contractor: Note 5   **Metra's PM/CM:** Note 6

Number	Date	To Company	Attention	From Company	By	3-Letter Document Code	Description	Notes	Logged By (Initials)
Note 7	Note 8	Note 9	Note 10	Note 11	Note 12	Note 13	Note 14	Note 15	Note 16