Instructions

The instructions presented in this document shall be followed by all Third Party Contractors regarding the Transmittal Cover Sheet. The Transmittal is used to send items between companies. The Transmittal describes what items are being sent, to whom they are being sent, and who is sending them. The Transmittal should be used by all parties on the project.

The company that is transmitting something should have their logo displayed on the Transmittal Cover Sheet. If the Transmittal is being sent from the Third Party Contractor to Metra, then the Third Party Contractor's logo should be displayed in the upper left-hand corner of the page, and vice versa.

Check boxes can be selected, which describe the reasons for transmitting the attached items. More than one (1) check box may be selected.

Follow the directions on the subsequent pages for entering data into the Transmittal Cover Sheet. Once the Transmittal is filled out, it should be printed, signed, and dated prior to sending.

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. The Transmittal Cover Sheet is a one (1) page form. Additional sheets may be attached, as necessary, to describe the items being transmitted. Any additional pages attached to the Transmittal Cover Sheet shall clearly identify the Project name, Metra Project number, Contract number and Task number (if applicable).
4. The general layout of the form has been established by Metra and shall not be altered by the Third Party Contractor.

INSTRUCTIONS

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Notes	Description
Note 1	Enter the Project name.
Note 2	Enter the Metra Project number.
Note 3	Enter the Contract number.
Note 4	Enter the Task number, if applicable.
Note 5	Enter the date of the Transmittal.
Note 6	Enter the Transmittal reference number. This is a sequential number (Ex. 1, 2, 3, etc). The number sequence is internal to each company on the project.
Note 7	Enter the name and address of the person that is receiving the Transmittal.
Note 8	Enter the name and address of the person that is sending the Transmittal.
Note 9	Check the appropriate boxes indicating what the package is being transmitted for. More than one (1) check box may be selected at a time.
Note 10	Enter the method by which the Transmittal is being delivered. (Ex. Messenger, UPS, FedEx, etc.)
Note 11	Enter the Transmittal tracking number, if available. This would be a UPS routing number, etc.
Note 12	Enter the item number. This is a sequential number (Ex. 1, 2, 3, etc).
Note 13	Enter the quantity of items.
Note 14	Enter the item type. Use the appropriate 3-letter code described in the Project File Naming/Directory Structure.
Note 15	Enter reference information, if applicable. If the transmittal is being sent in regards to a meeting minute action item, an ROCC, etc, then this reference should be stated.
Note 16	Enter a description for the item(s) being transmitted.
Note 17	Enter any additional notes regarding the item.
Note 18	Enter the status of the item, if necessary.
Note 19	Enter the name of the company being carbon copied on the Transmittal.
Note 20	Enter the name of the person being carbon copied on the Transmittal.
Note 21	Enter the number of copies sent to the person carbon copied on the Transmittal.
Note 22	Enter any notes for the person being carbon copied on the Transmittal.
Note 23	Enter any additional remarks to clarify the content of the Transmittal.
Note 24	Provide the signature of the person sending the Transmittal.
Note 25	Provide the date that the Transmittal is signed.

INSTRUCTIONS

Transmittal Cover Sheet

Project Name: Note 1

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

Date: Note 5 **Reference Number:** Note 6

Transmitted To	Transmitted By
Note 7	Note 8

Package Transmitted For Note 9		Delivered Via	Tracking Number
☐ Information	☐ Returned	Note 10	Note 11
☐ As Requested	☐ Approved as Noted		
☐ Review	☐ Approval		
☐ Comments	☐ Signature		
☐ Submission	☐ Returned for Corrections		
☐ Other			

Item #	Qty	Item	Reference	Description	Notes	Status
Note 12	Note 13	Note 14	Note 15	Note 16	Note 17	Note 18

Cc:	Company Name	Contact Name	Copies	Notes
	Note 19	Note 20	Note 21	Note 22

Remarks

Note 23

Note 24

Signature

Note 25

Signed Date

INSTRUCTIONS