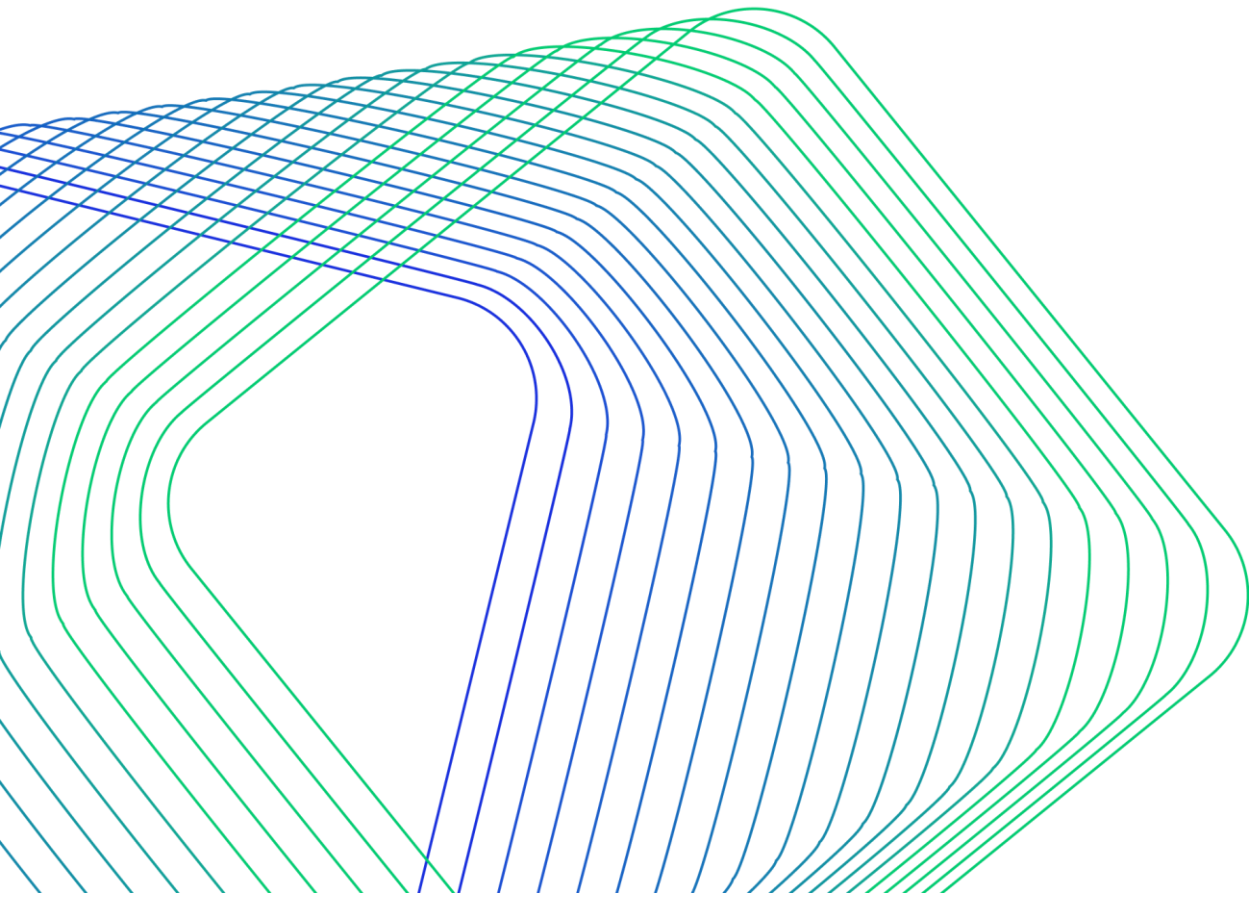
StackDX

Roads & Thirds Request Portal



Overview

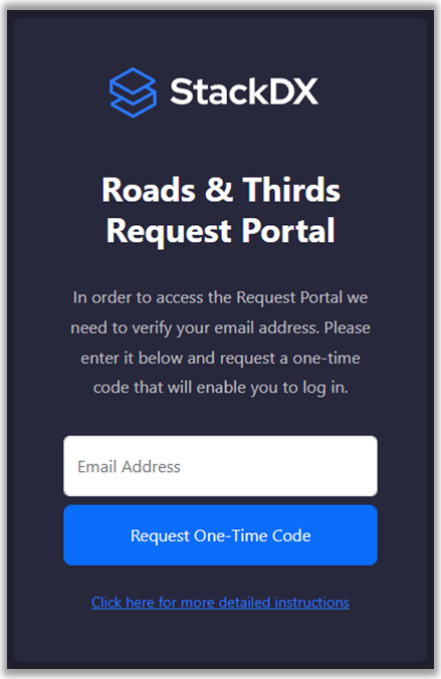
Submit and view all your requests/notices using StackDX's Roads & Thirds Request Portal with no need for a StackDX Account.

See the steps in the sections below to learn more about the process including how to log in, submit/view requests/notices and complete signature requests.

Login Instructions

Follow the steps below to log into the Roads & Thirds Request Portal using your email and a one-time code to start the request process.

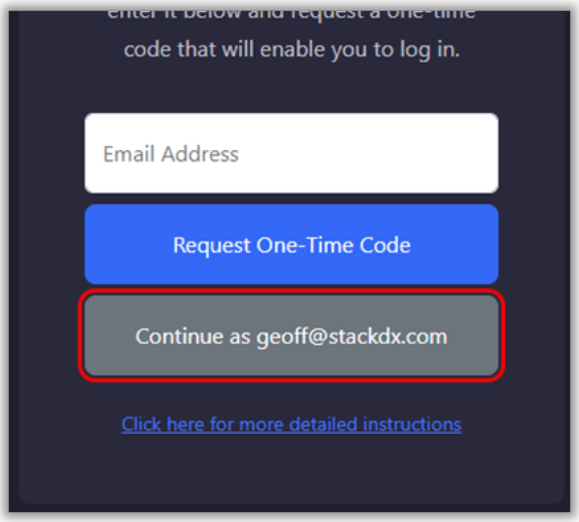
1. Navigate to the following link - https://app.stackdx.com/Public/Login ↗



2. Input the email you would like to use to submit or view a request

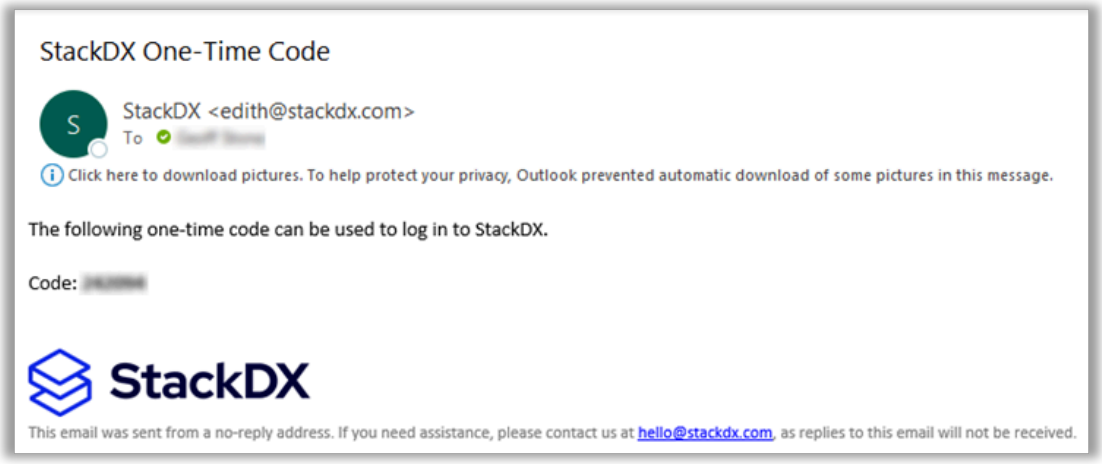
The email may be personal or group accessible depending on if multiple people will need to access the requests.

Note: If you are already logged into StackDX on your browser and navigate to the Roads & Thirds Request Portal site there will be a **Continue as <email>** option to quickly log in using that email without requesting a one-time code.

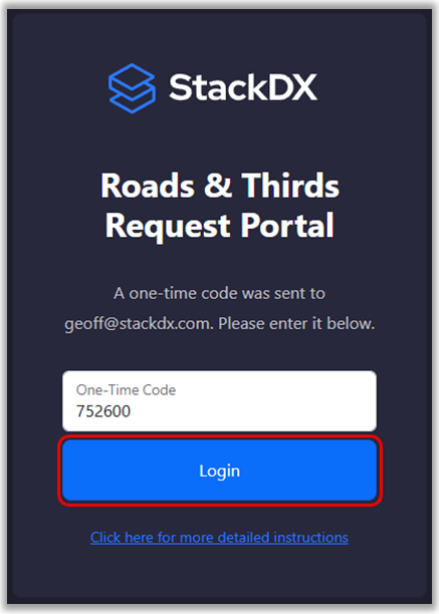


If you would like to log in with a different email you would follow the regular login process and enter the email and request the one-time code.

3. Click **Request One-Time Code** to receive the code to your email



4. Enter the provided code and click **Login**

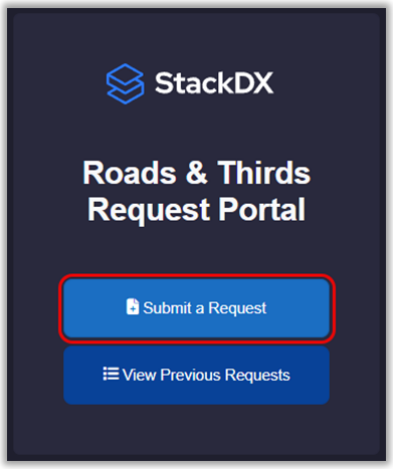

StackDX
Roads & Thirds Request Portal
A one-time code was sent to geoff@stackdx.com. Please enter it below.
One-Time Code
752600
Login
Click here for more detailed instructions

Submit Road Use & Third Party Requests

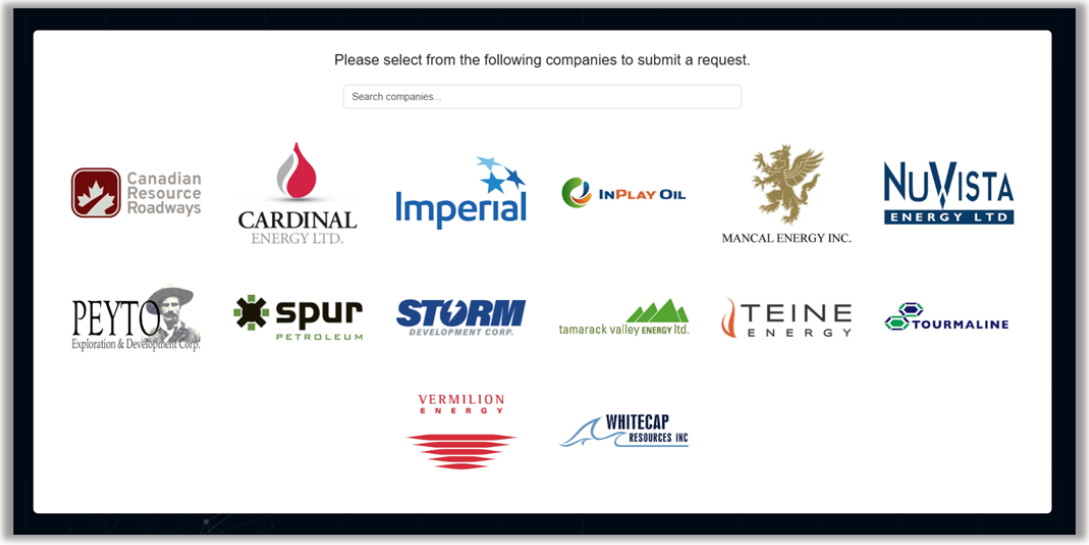
Submit your Road Use Agreement and Third Party Agreement requests in the Public Request Portal. After choosing your company to submit your request for select either Road Use or Third Party Agreement options to enter your request details.

Login & Submit a Request

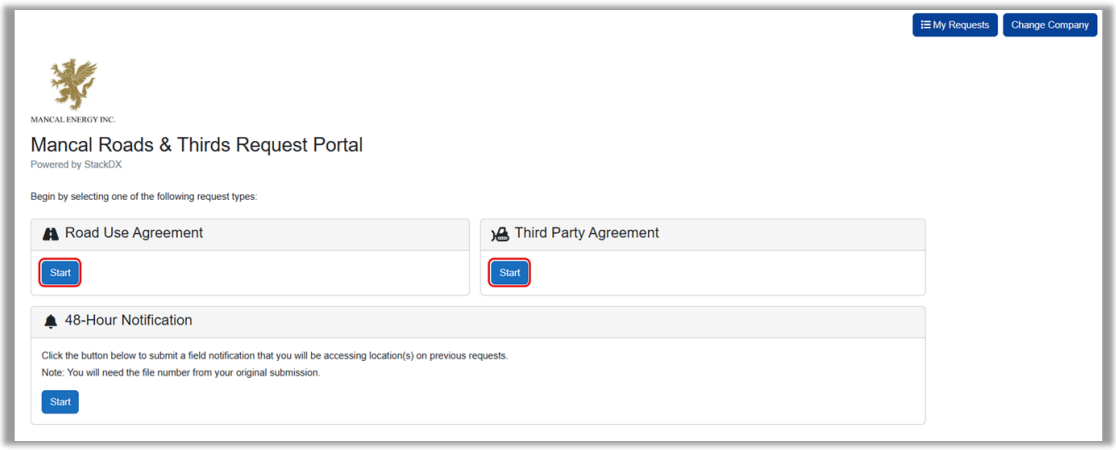
1. Log into the Roads & Thirds Request Portal ↗
2. Click **Submit a Request**



3. Choose a company for your request

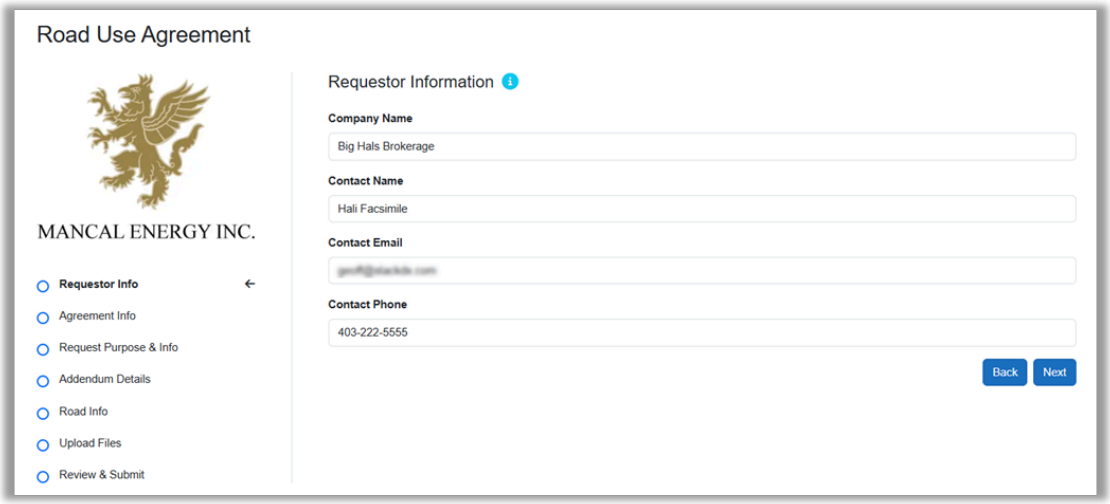


1. In the Roads & Thirds Request Portal click **Start** for either a Road Use Agreement or Third Party Agreement

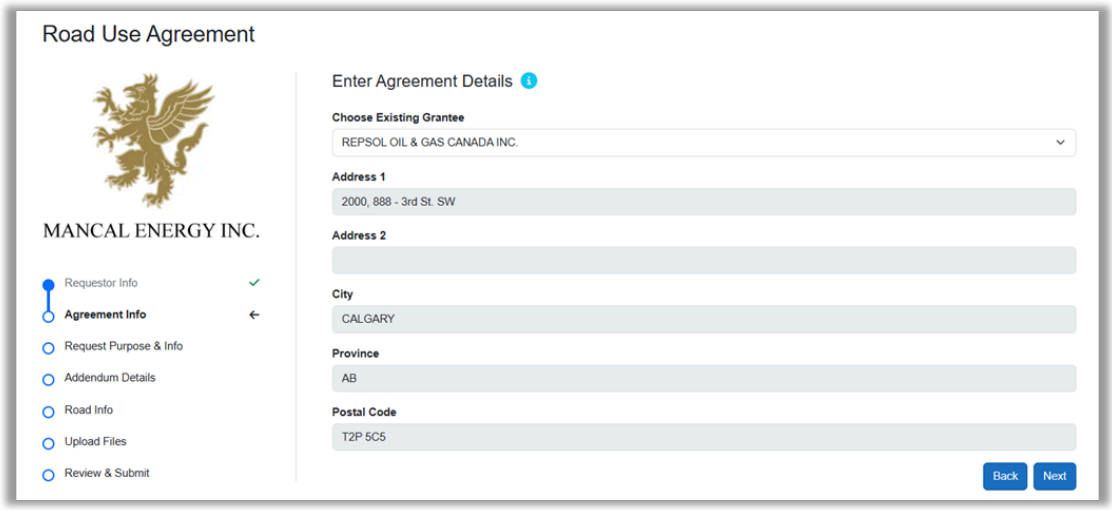


2. Enter Requestor Information (ie. Broker/Grantee Contact Info)

> Note: The request will only be able to be accessed in the Public Request Portal by the email entered in the Requestor Information section. If the requestor information (ie. Email) for any previously submitted requests need to be adjusted to change access to another person please contact hello@stackdx.com.



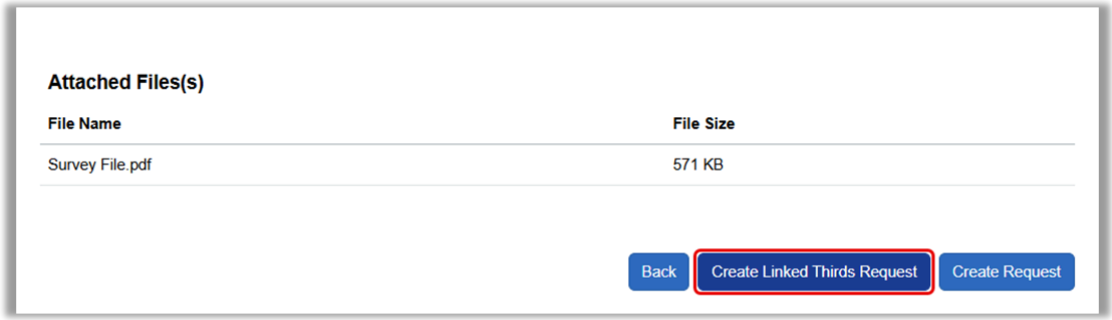
3. Select Existing Grantee or Create a New Grantee if not present



Note: If any changes to the Grantee company name or address are required, please reach out to the Grantor directly to make the adjustments.

4. Enter request details (ie. Purpose, Addendum Details, Road Info)
5. Upload relevant documents (ie. Survey/Access Route (required), Request Letter, Other Files)
6. Click **Create Request**

Tip: When submitting a Road Use or Third Party Agreement there will be an option to **Create Linked Roads/Thirds Request**. This will allow you to submit another related request more efficiently if needed. The requests will be linked together upon submission for the Grantor.



The Grantor will receive a notification that the request was submitted. The Requestor will receive an email confirming that the request was submitted with a summary of the request details.

The request will be displayed in the My Requests Grid. There is the ability to search/filter by keywords, Request Type and Request Status. Click on a request to view all the request details.

See the View Requests section for more details on viewing & searching request details.

Note: Only requests that were submitted by the email used to log into the portal will be displayed in the My Requests Grid. The email logged in will display in the top right corner of the portal. If the requestor information (ie. Email) for any requests need to be adjusted to change access to another person please contact hello@stackdx.com.

Submit 48-Hour Notification

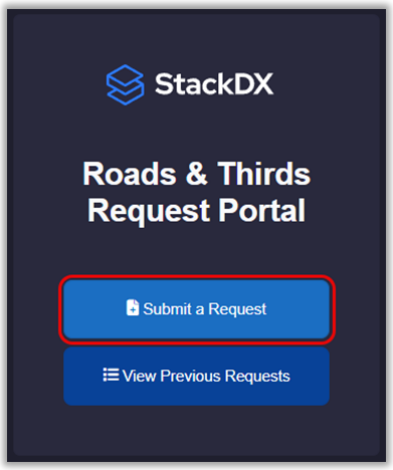
The Grantor may require the Grantee to provide their 48-Hour Notice prior to commencing the intended activity of the Road Use or Third Party Agreement via StackDX's Roads & Thirds Request Portal. This guide will walk you through submitting the notice.

Submit your 48-Hour Notices in the Roads & Thirds Request Portal. After choosing your company to submit your notice for select 48-Hour Notification option to enter your notice details.

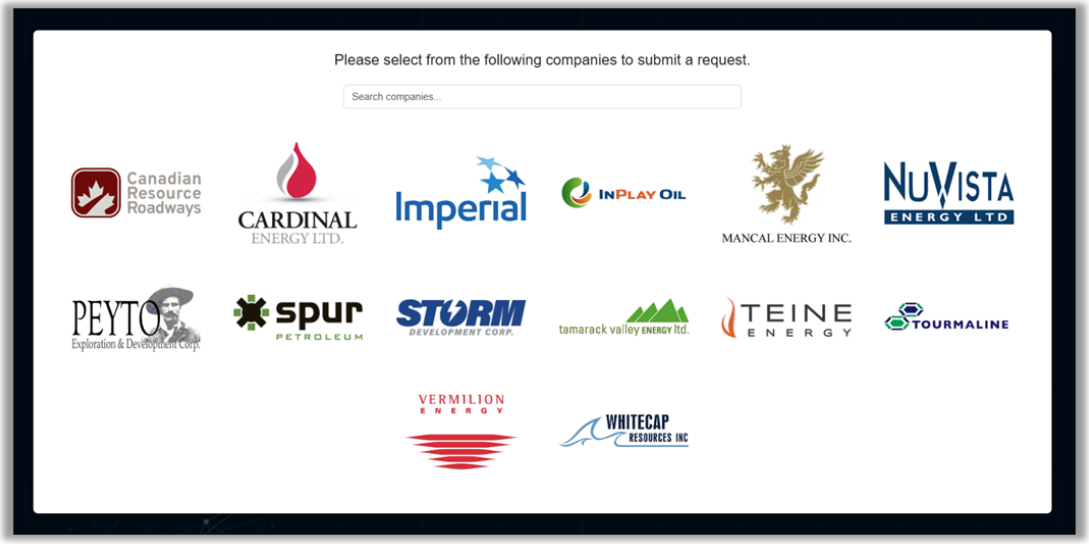
> Note: The 48-Hour Notification option will only be available for a company in the Roads & Thirds Request Portal if they have it enabled.

Login & Submit a Request

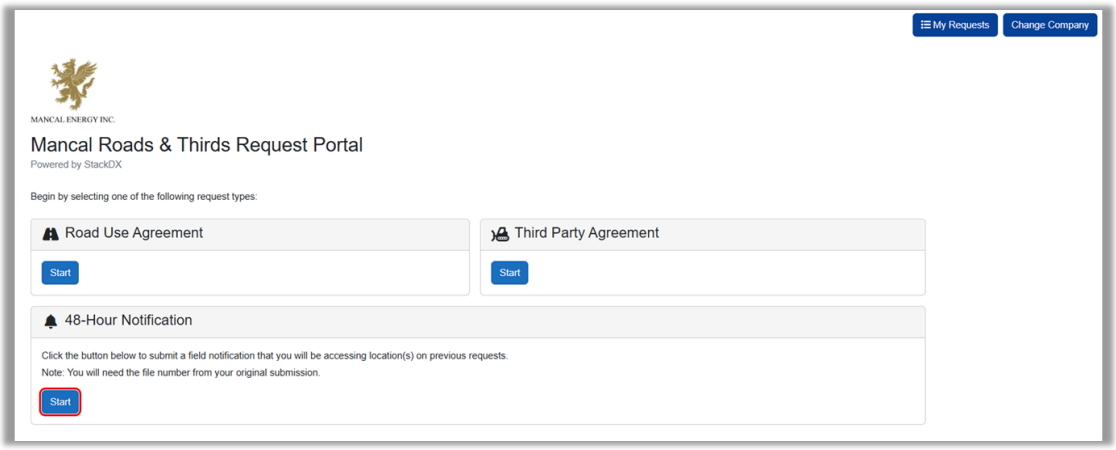
1. Log into the Roads & Thirds Request Portal ↗
2. Click **Submit a Request**



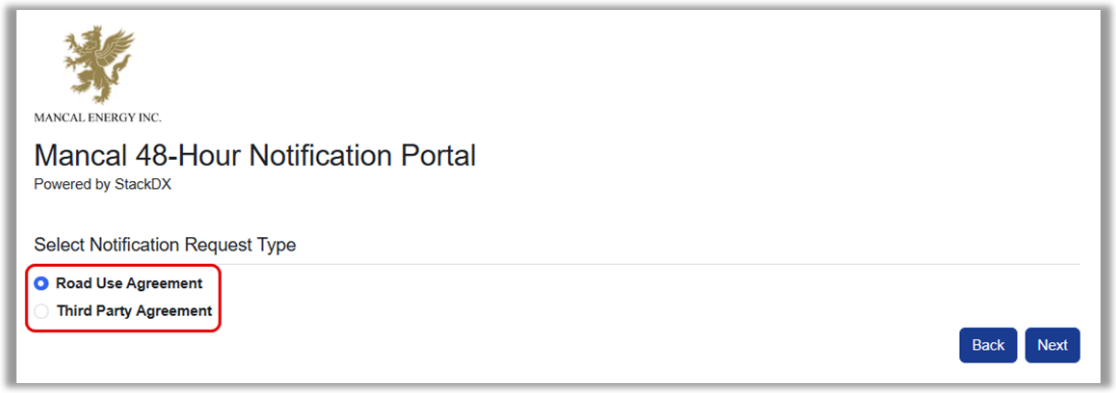
3. Choose a company for your request



1. In the Roads & Thirds Request Portal click **Start** for 48-Hour Notification



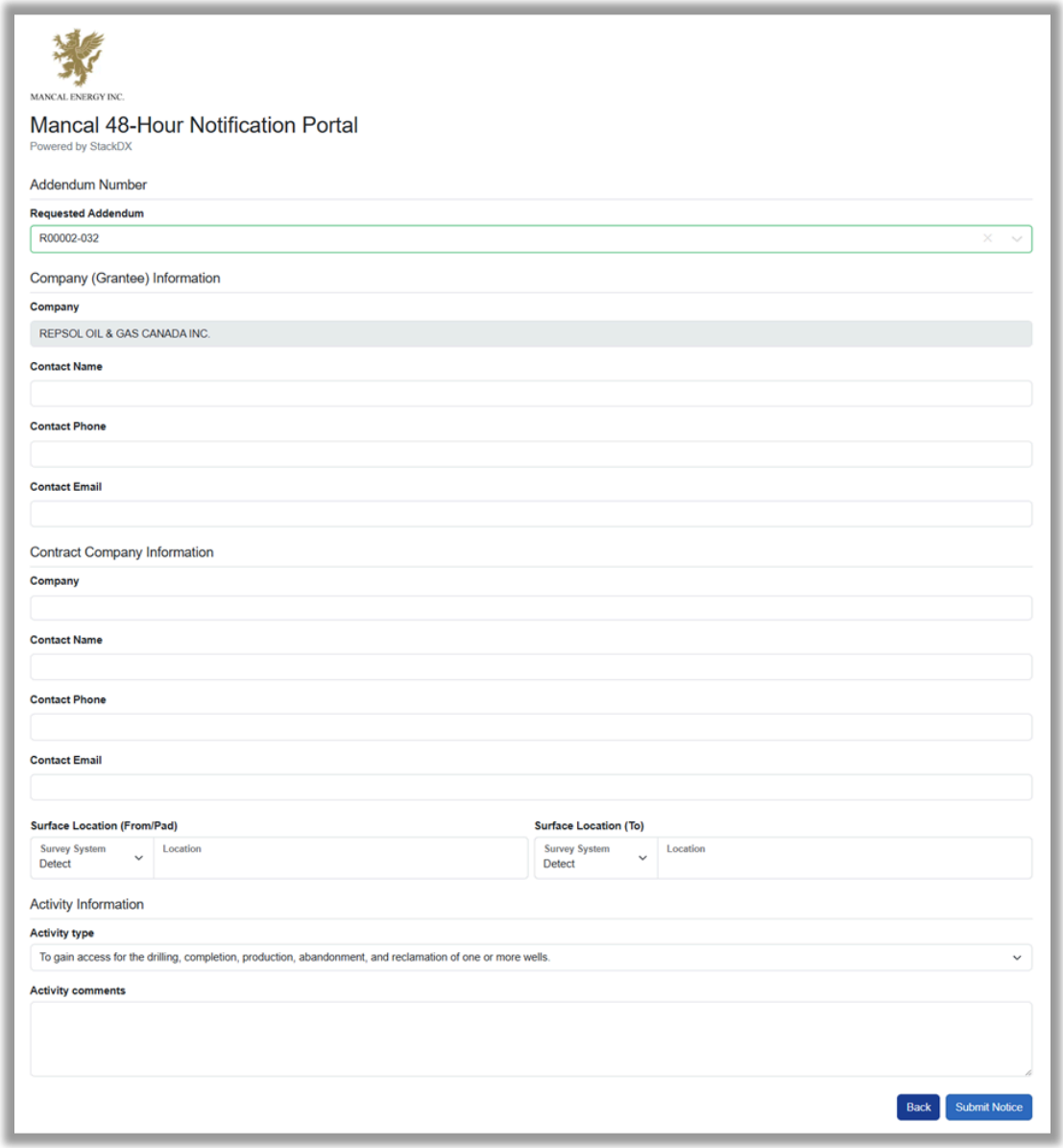
2. Select a **Notification Request Type** (Road Use or Third Party Agreement) and click **Next**



3. Select an addendum from the **Requested Addendum** dropdown

Note: The dropdown will contain any addendums at that company which have been Approved, Sent for Signature or Executed by the Grantor. After selecting the addendum the Grantee Company field will automatically be filled out using the information from the chosen addendum.

4. Enter Contact/Request Information (ie. Grantee Contact Info, Contract Company Contact Info, Surface Location, Activity Info)



Note: Grantee/Contract Company Contact Info and Surface Location are required fields. Other information are optional but may help the Grantor when submitting your notice.

5. Click **Submit Notice**

The Surface Location entered is required to match the information on the selected addendum. If the entered Surface Location does NOT match the information from the selected addendum a message will appear letting you know to confirm the information before submitting your notice.

After successfully submitting your 48-Hour Notice if any Field Representative(s) have been added to the addendum in StackDX by the Grantor then their contact information will be displayed for reference.

The Grantor will receive a notification that the notice was submitted. The notice will be displayed in the My Requests Grid. There is the ability to search/filter by keywords, Request Type and Request Status. Click on a 48-Hour Notice to view all the notice details.

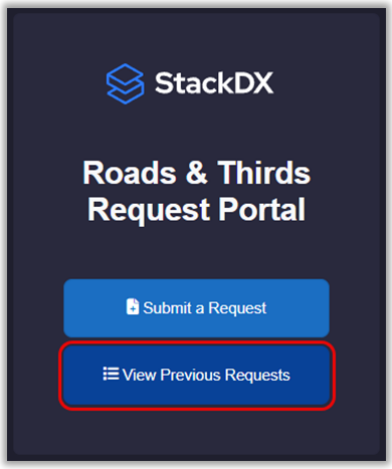
Note: The 48-Hour Notices will appear in the Roads & Thirds Request Portal for the email that was entered in the Grantee Contact Information when submitted. The email logged in will display in the top right corner of the portal. If the contact information (ie. Grantee Contact Email) for any previously submitted requests need to be adjusted to change access to another person please contact hello@stackdx.com.

View Requests

To view your submitted or received requests log into the Roads & Thirds Request Portal and click **View Previous Requests**.

<details open>
<summary>Login & View Previous Requests</summary>

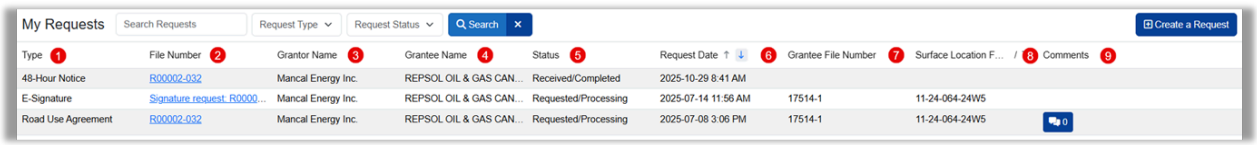
1. Log in to the Roads & Thirds Request Portal ↗
2. Click **View Previous Requests**



</details>

My Requests Grid Overview

The **My Requests Grid** will display with all your submitted Road Use and Third Party Agreement requests, 48-Hour Notices and received E-Signature requests. There is the ability to search/filter by keywords, Request Type and Request Status.



Summary of the My Request Grid items:

1. **Type** - The type of request (48-Hour Notice, E-Signature, Road Use Agreement or Third Party Agreement)
2. **File Number** - The addendum number assigned to the request/notice

Note: The File Number displayed in the Public Request Portal will originally be the Requested Addendum added for the notice when submitted but will change to the assigned addendum number once the Grantor has assigned the notice to an addendum.

3. **Grantor Name** - The name of the Grantor Company that the request was made for
4. **Grantee Name** - The name of the Grantee Company that made the request
5. **Status** - The current status of the request

There are 7 different statuses for requests - Accepted, Awaiting Signature, Cancelled, Executed, Received/Completed, Rejected, Requested/Processing

Summary of Request Statuses

Accepted: The E-Signature Request has been signed/accepted by the Grantee

Awaiting Signature: Status given to Road Use or Third Party Agreement Request when a signature request has been sent out and is awaiting signature from the Grantee

Cancelled: The E-Signature Request has been cancelled by the Grantor

Executed: The E-Signature Request has been signed/executed by the Grantor

Received/Completed: Status given to Road Use or Third Party Agreement Request when the request has been approved by the Grantor

Rejected: Status given when the Road Use or Third Party Agreement Request has been rejected by the Grantor OR the E-Signature Request has been rejected by the Grantee

Requested/Processing: Status given to a Road Use or Third Party Agreement Request that has not yet been approved by the Grantor OR the E-Signature Request has not yet been signed/accepted by the Grantee

6. **Request Date** - The date the request was submitted/received
7. **Grantee File Number** - The Grantee File Number for the request assigned to the notice
8. **Surface Location From/To** - The surface location for the request

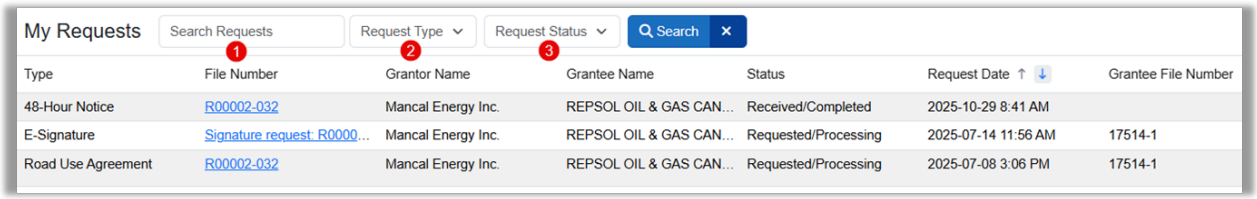
Note: The Surface Location displayed in the Roads & Thirds Request Portal will originally be the surface location added for the notice when submitted but will change to the surface location of the assigned addendum once the Grantor has assigned the notice to an addendum.

9. **Comments** - The comments icon will display the number of comments for a Road Use or Third Party Agreements Request. Click the icon to view the request details for you to submit your comment to the Grantor.

> Note: For Road Use Agreement, Third Party Agreement or E-Signature requests only requests that were either submitted by or sent to the email used to log into the portal will be displayed. For 48-Hour Notices only notices will display in the portal for the email that was entered in the Grantee Contact Information when submitted. The email logged in will display in the top right corner of the portal.
>
> If the requestor/contact information (ie. Email) for any previously submitted requests need to be adjusted to change access to another person please contact hello@stackdx.com.

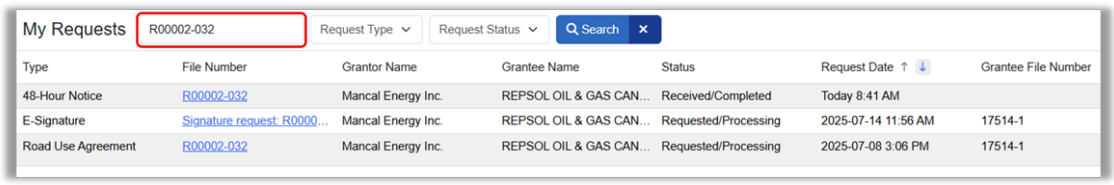
Requests Search & Filter

In the My Requests Grid the requests can be filtered to help find the requests you are looking for (ie. Filter for only Road Use Agreements). Select the search/filter criteria and click **Search** to display the results. To clear the search/filters and return to the default click the **X**.

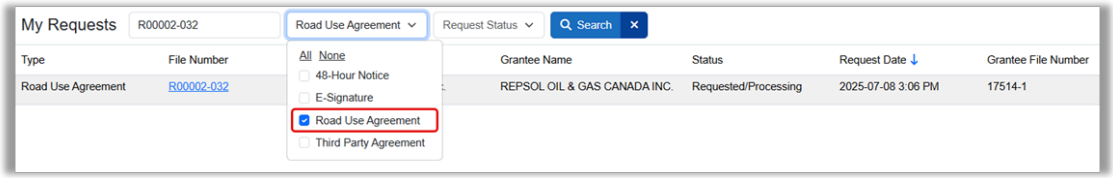


Summary of the Requests Search/Filter options:

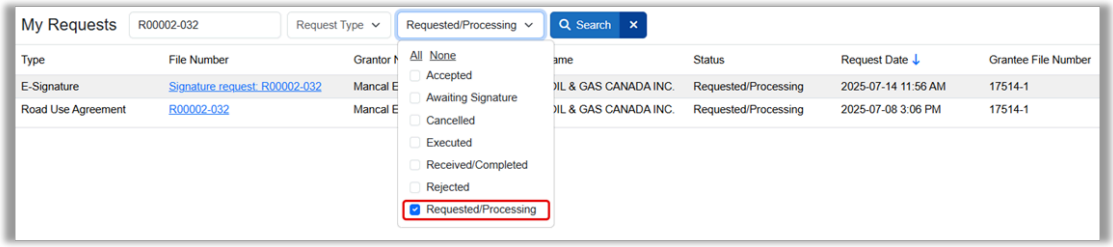
1. **Requests Search** - Enter keywords into the search bar to search for full or partial matches in the Addendum/File Number, Grantor/Grantee Name or Grantee File Number fields



2. **Request Type** - Select the type of request (48-Hour Notice, E-Signature, Road Use Agreement or Third Party Agreement)



3. **Request Status** - Select the current status of the request (ie. Requested/Processing)



Summary of Request Statuses

Accepted: The E-Signature Request has been signed/accepted by the Grantee

Awaiting Signature: Status given to Road Use or Third Party Agreement Request when a signature request has been sent out and is awaiting signature from the Grantee

Cancelled: The E-Signature Request has been cancelled by the Grantor

Executed: The E-Signature Request has been signed/executed by the Grantor

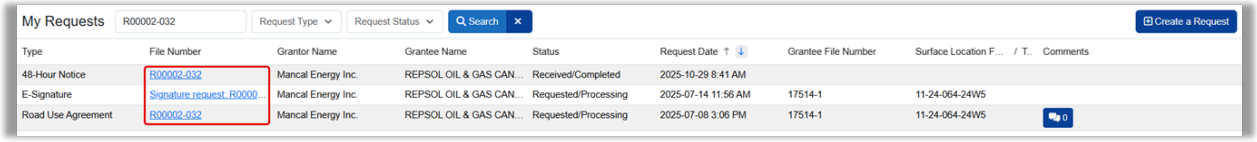
Received/Completed: Status given to Road Use or Third Party Agreement Request when the request has been approved by the Grantor

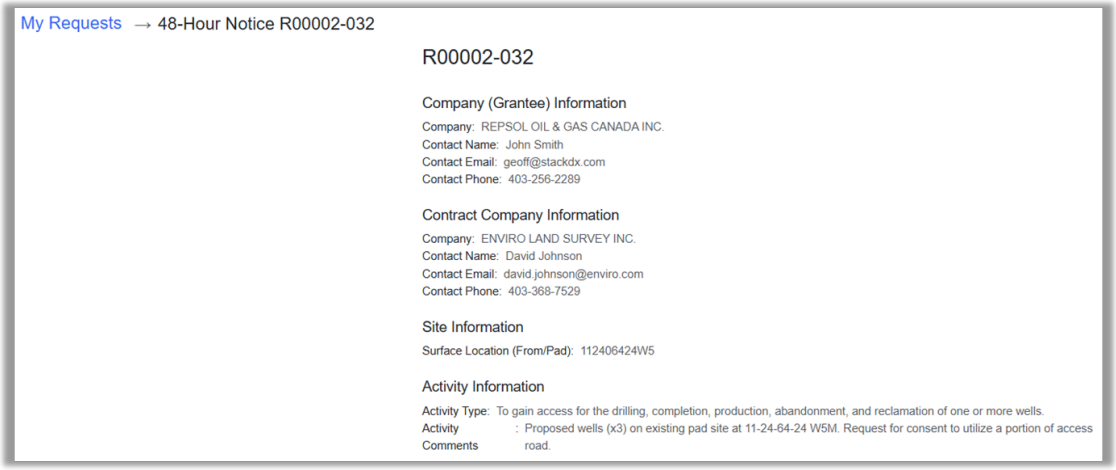
Rejected: Status given when the Road Use or Third Party Agreement Request has been rejected by the Grantor OR the E-Signature Request has been rejected by the Grantee

Requested/Processing: Status given to a Road Use or Third Party Agreement Request that has not yet been approved by the Grantor OR the E-Signature Request has not yet been signed/accepted by the Grantee

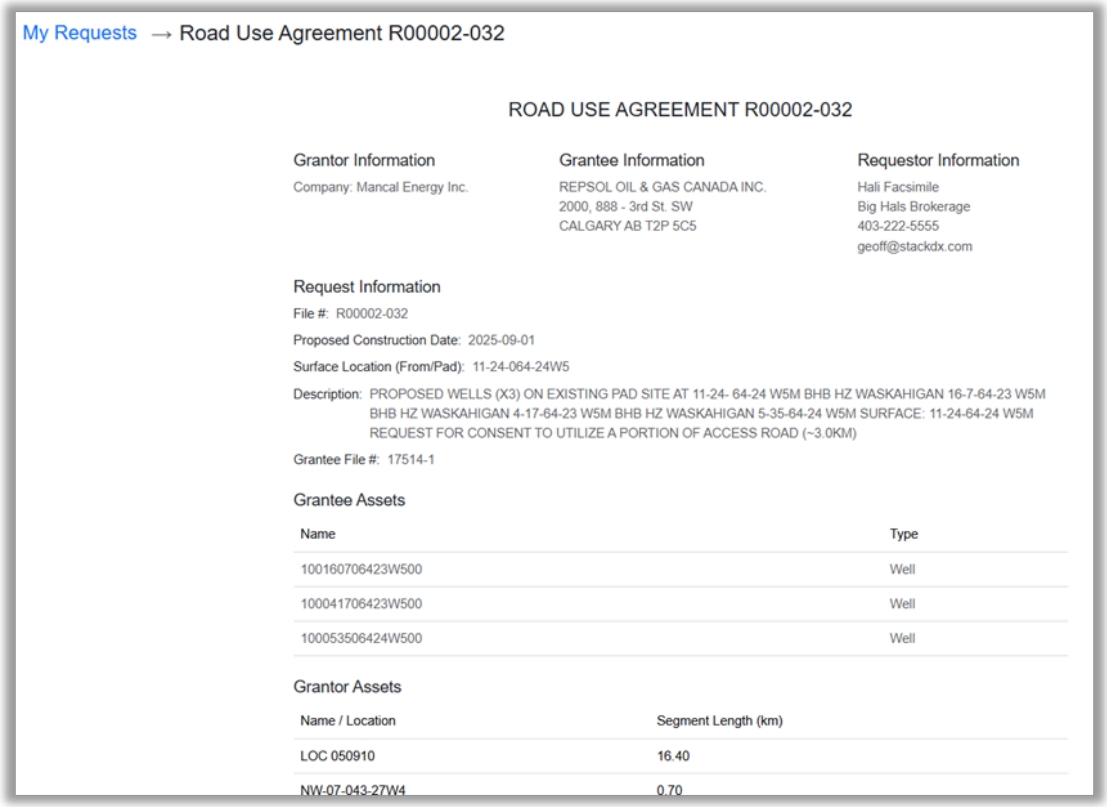
View Request Details

In the My Requests Grid click on a submitted Road Use or Third Party Agreement requests, 48-Hour Notices or received E-Signature requests to view all the request/notice details.

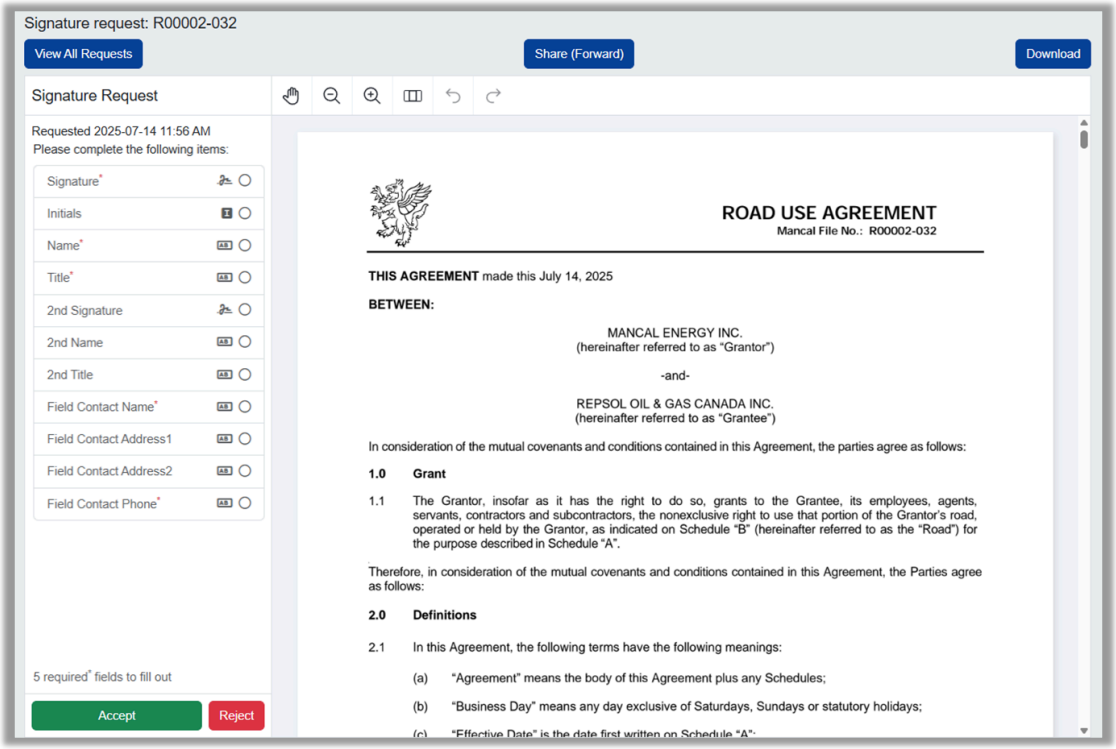




48-Hour Notice Example



Road Use Agreement Request Example

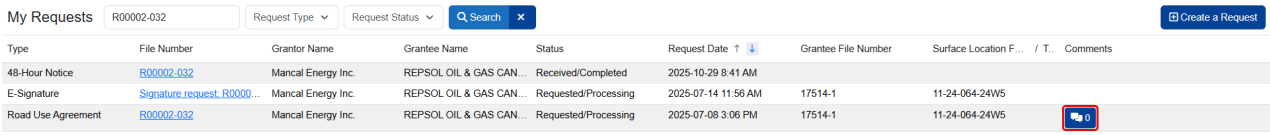


E-Signature Request Example

Adding Request Comments

While viewing a Road Use or Third Party Agreement request you can add comments to communicate directly with the Grantor Company.

The 'Comments' column of the My Requests Grid will display an icon displaying the number of comments for the request. If you click the icon it will go to the request details for you to submit a comment to the Grantor.



See the Communicate with Grantor section for more details on adding comments.

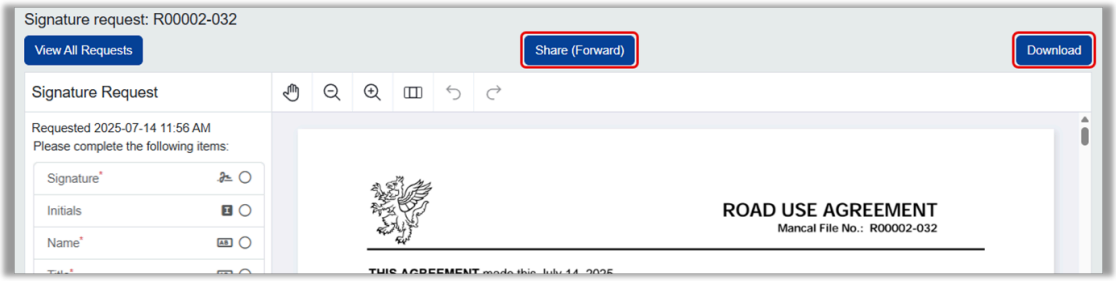
E-Signature Request Review & Sign

When viewing a received E-Signature Request you will be able to review the agreement, enter the required fields, sign and accept the agreement within the Roads & Thirds Request Portal.

See the E-Signature Request Process section for more details on reviewing and signing signature requests.

Share/Forward E-Signature Requests

When viewing a received E-Signature Request there is also the ability to **Share/Forward** the request to another person and **Download** the agreement if required.



See the Share/Forward E-Signature Requests section for more details.

Communicate with Grantor

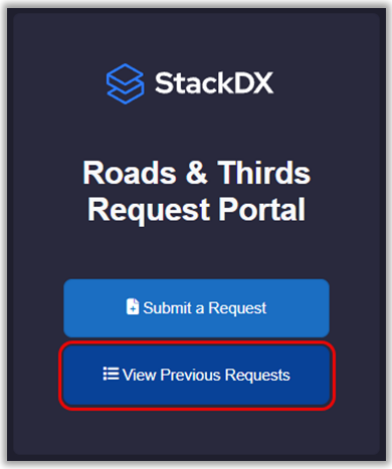
If you submitted a request and have any questions/concerns in regard to your request you can reach out directly to the Grantor in the Roads & Thirds Request Portal.

While viewing the request you have the ability to add comments that will be sent via email to the Grantor and display them in the request for review. The Grantor will be able to reply to your comments which you will be notified of via email and view them in the Roads & Thirds Request Portal.

To submit a comment to the Grantor either click on the request to view the request details and enter your comment in the 'Comments' panel or alternatively click the icon in the 'Comments' column of the My Requests Grid to view the request details for you to submit your comment to the Grantor. The comments icon in the My Requests Grid will display the number of comments for the request.

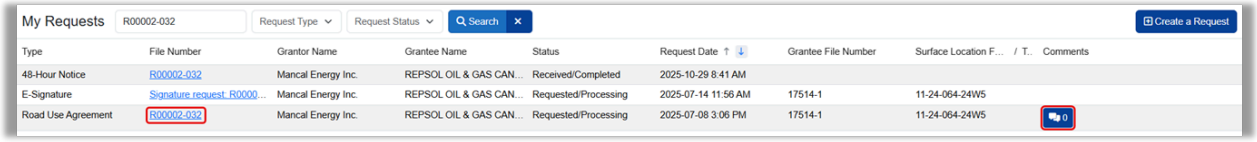
<details>
<summary>Login & View Previous Requests</summary>

1. Log in to the Roads & Thirds Request Portal ↗
2. Click **View Previous Requests**



</details>

1. In the My Requests Grid click on your request or the icon in 'Comments' column



2. Submit your comments on the 'Comments' panel

The comments will be sent via email to the Grantor and display them in the request for review. The Grantor will be able to reply to your comments which you will be notified of via email and view them in the Roads & Thirds Request Portal.

Upload Additional Documents

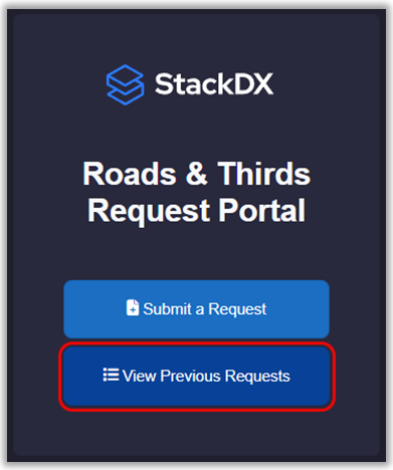
If you need to provide additional documents to the Grantor you can upload documents when viewing a submitted Road Use or Third Party Agreement request in the Roads & Thirds Request Portal.

The uploaded files will be added to the request and be available for the Grantor to view. Any documents added to the request by the Grantor will appear in the Roads & Thirds Request Portal in the Documents section for the requestor to view.

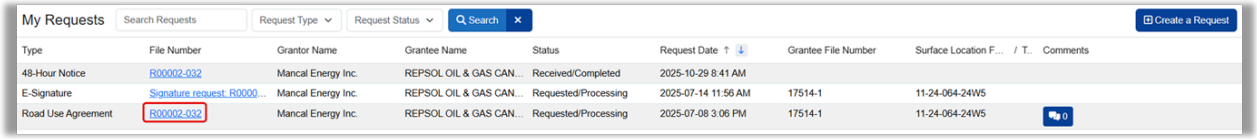
> Note: The Grantor will NOT be notified when documents are uploaded. You may want to send the Grantor a comment to notify them when uploading the documents.

Login & View Previous Requests

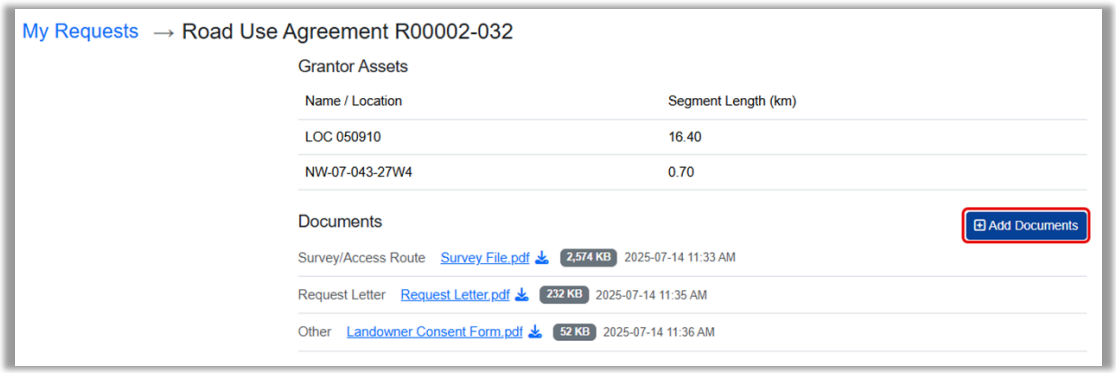
1. Log in to the Roads & Thirds Request Portal ↗
2. Click **View Previous Requests**



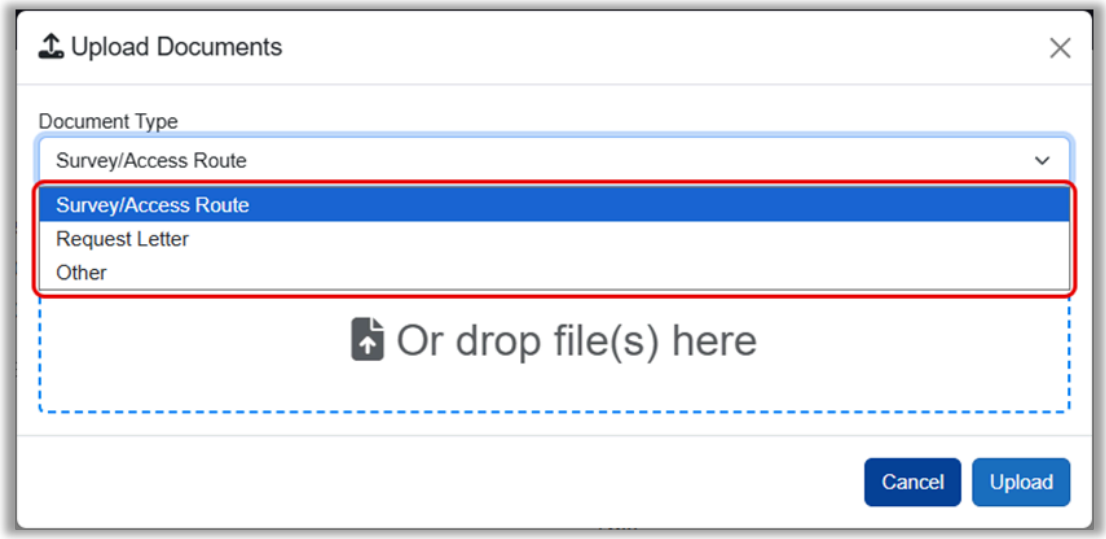
1. In the My Requests Grid click on your Road Use or Third Party Agreement request



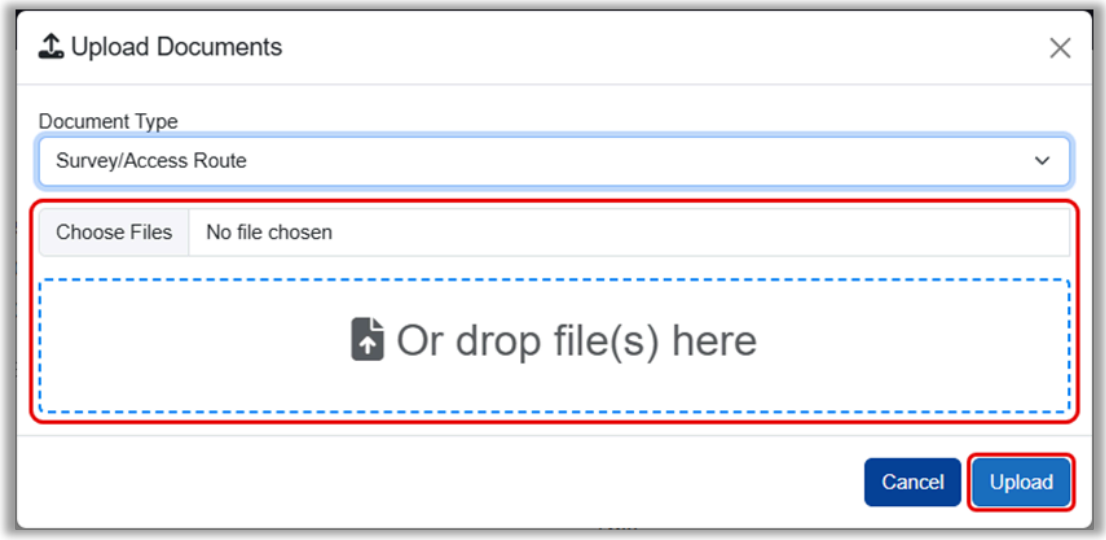
2. Click **Add Documents** in the Documents section of the request details



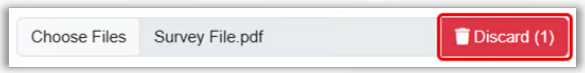
3. Select a **Document Type** from the dropdown (Survey/Access Route, Request Letter, Other)



4. Either click **Choose Files** and browse to your documents OR drag your documents to the **Or Drop file(s) here** box



Note: If you selected the incorrect files and do not want to upload it click **Discard**.



5. Click **Upload**

The uploaded document(s) will be added to the request in both StackDX for the Grantor and in the Roads & Thirds Request Portal for the Grantee/Requestor.

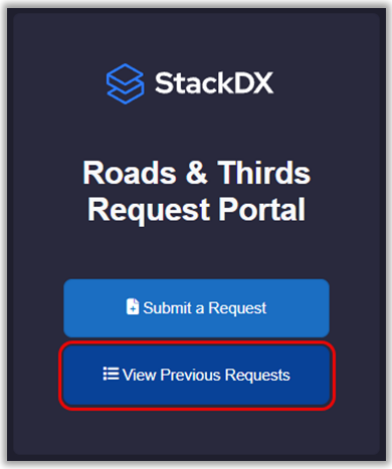
E-Signature Request Process

Once your request has been approved by the Grantor they will generate an agreement and send it for E-Signature. An E-Signature Request will be sent to you via email and will contain the details of the request and a link to gain access to the request via the Roads & Thirds Request Portal.

The received E-Signature request will appear in the Roads & Thirds Request Portal to review, enter information, sign and accept the agreement. See below on how to proceed if you received an E-Signature request.

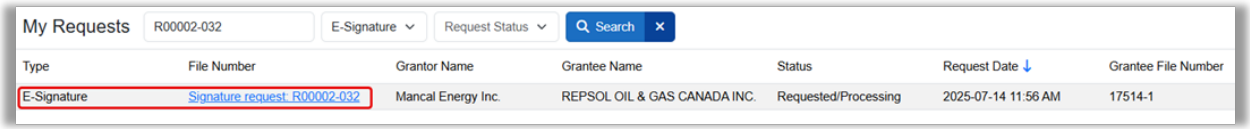
<details>
<summary>Login & View Previous Requests</summary>

1. Log in to the Roads & Thirds Request Portal ↗
2. Click **View Previous Requests**



</details>

1. In the My Requests Grid click on your E-Signature request



Tip: If you navigate to the request via the email link it will open to the document immediately after logging in rather than navigating to it within the Roads & Thirds Request Portal.

2. Once the required fields have been filled out then you will be able to Accept the agreement or alternatively Reject the signature request if needed

The Grantor will be notified of your acceptance or rejection. If accepted, the Grantor can then execute the agreement.

The first recipient of the E-Signature Request will receive an email when the agreement has been executed by the Grantor.

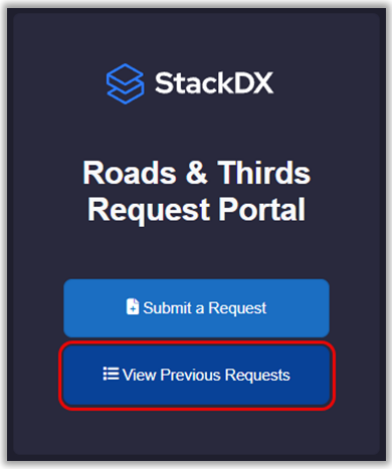
If multiple people are needed to review, initial or sign the agreement there is the ability to share/forward the E-Signature request for others to access. See the Share/Forward the E-Signature Requests section for more details.

Share/Forward E-Signature Requests

If multiple people are required to view, sign, initial or download the document it can be sent to others for them to access by utilizing the Share (Forward) option. The recipient will be sent an email with the link to access the document in the Roads & Thirds Request Portal.

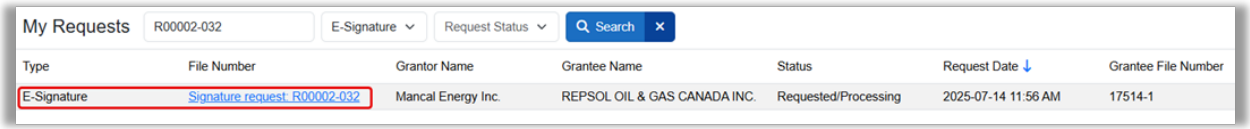
<details>
<summary>Login & View Previous Requests</summary>

1. Log in to the Roads & Thirds Request Portal ↗
2. Click **View Previous Requests**



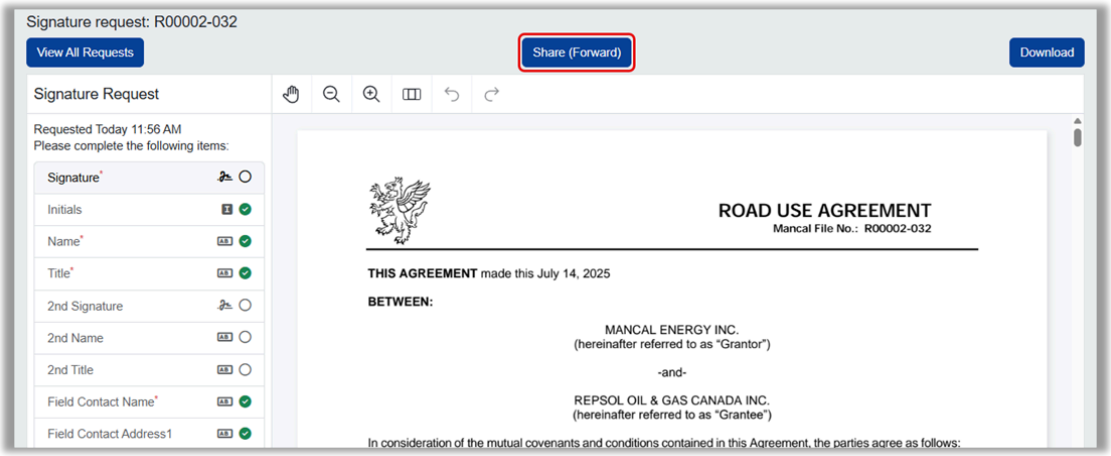
</details>

1. In the My Requests Grid click on your E-Signature request

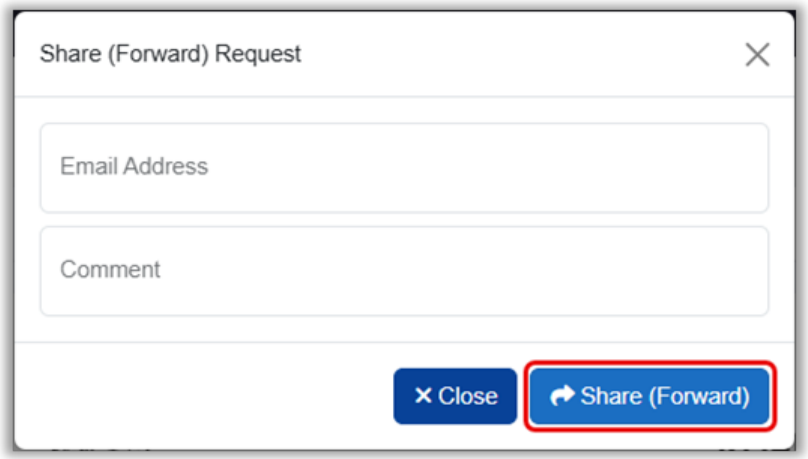


> Tip: If you navigate to the request via the email link it will open to the document immediately after logging in rather than navigating to it within the Roads & Thirds Request Portal.

2. Click **Share (Forward)**



3. Enter Recipient Email and optional Comment and click **Share (Forward)**



Note: If comment is added it will be included in the email notification that is sent to the recipient of the E-Signature request.

Any information that has been filled out on the document when you click **Share (Forward)** will be saved for others to view when accessed.

Important: The document cannot be modified after the E-Signature request has been accepted, which will become available after all the required information has been added. If multiple signatures/initials are needed do NOT accept the agreement prior to all parties completing their sections.