

Heim, Kimber

From: Moorman, Patty
Sent: Thursday, January 18, 2024 7:52 PM
To: Heim, Kimber
Subject: RE: 115989 Memo for Approval of RSP Amount
Attachments: 115989 MUS 376 PCL 010-1 SITE DESCRIPTION COMP ANALYSIS Revised.docx; 115989 MUS 376 PCL 010-1 Residential Workbook Revised.xlsx; 115989 MUS 376 PCL 010-1 RE-615 Revised.docx; 115989 MUS 376 PCL 010-1 PRIME COMP RSP Memo Revised.docx

First, on the relocation notes: I removed Aydin from the top right Relocatee's Names as he is no longer a Displacee.

In the notes I added that if they move before the offer to purchase the property is presented they will not be eligible for benefits.

I removed reference that this is a non-residential parcel. It is a residential parcel. I removed that you gave the "non-residential brochure" and added a residential brochure.

Notes need to address that Thomas and Hope have new jobs and will not provide information on their income. They understand that without verification of income, low income will not be factored in to the calculated rent supplement payment. You need to state how many times you requested this information. I have attached the revised notes—you need to add the income info and finish with you submitted your determination for approval. You need to add your initials after each entry (per date)

On the RE600, I corrected the SF to 918 to match the memo for the site description. I changed total room count from 5 to 4. I did the drop down box for the basement to show it is unfinished.

On the RE611(T) I did the drop down box for exterior for Comp 2. To show wood. You need to add in the contact name for comp 3.

Market rent—you need to include the grid for your comps and prepare a memo explaining how you derived at \$675 and requesting approval of the amount you determined for market rent. You need to have approval of the market rent, not just make the determination and put it in your rsp determination.

In your memo for approval of the RSP and LRH, the first part of the memo you sent to me describes the house as what you had in your original memo, not what I revised. I changed the information so it matches the site description. I added in that this is a three comp determination (clarifying you do not need to ask for approval of less than 3 comparables). I added in the memo line that you are also requesting last resort housing approval. I removed that you are an agent in training. If you are an agent in training then I have to co-sign as a relocation agent. If I am a relocation agent, then I cannot be the reviewer. You are working as a relocation agent on "probation" with probational authority for my recording keeping. You do not state that in your parcel file.

Below is the list of what you would need to submit for billing of a RSP payment. While you are not submitting a billing, this is what you should be submitting as a package to a reviewer for approval. You have been submitting parts and pieces to me, which makes it difficult to review because things do not match. But that is okay as this was a learning experience for you on what all is needed for a determination. A LOT OF PAPERWORK TO SUPPORT THE DETERMINATION. On the future determinations, you need to put together the "package" when you ask for approval. It is what you would expect from a consultant. When I review a determination I should have everything

in front of me at once—the workbook filled out, all supporting documentation, all memos, market rent if applicable, appraisal information to check, etc. We did this one slowly as you were learning. Take a look at the list below. You would not need the W9 and Supplier form or the claim form, but most of the other stuff you would be expected to forward. You would not be doing a DS&S inspection yet, and they did not provide you with income in this situation so you would not have the income verification form. You should have the rent and utility form filled out, and just state no lease, no rent but it does show the type of heat and other utilities in the house-or lack of in this case. I would use this as a checklist when I put the package together, and even include it in the submittal to document what I sent. For the determinations on FAI 33 I want you to send me a package, not pieces since you should now have a better idea of how to put together a housing payment.

I need the request for approval of the market rent and then I believe I have made all the corrections needed. I don't think you ever sent me your final grid and definitely no memo for approval. Review and turn any red text to black. Once I receive your market rent memo to approve, I will then approve everything. Prepare your offer letters.

6603.09 Billing Package- Owner Occupant of Less than 90 Days or Tenant Occupant Who Rents

A. The complete billing package must be approved by the Relocation Reviewer prior to the Residential Claim Form (RE-617) being presented to the Displaced Person for signature. The contents of the billing package for a replacement housing payment are:

1. W-9 Form and Vendor Information Form (VIF), as applicable.
2. Original and one copy of the Residential Claim form (RE-617).
3. One copy of the Residential Site Occupant Relocation Record form (RE-610).
4. One copy of the Relocation Comparables and Additive Computation form (RE-611) plus the Utility Allowance Schedule for the site and comparables.
5. One copy of the RE 607 with attached, signed and dated lease or three rent receipts for the acquired site and one rent receipt for the replacement site, plus the Utility Allowance Schedule for the replacement site.
6. One copy of the Economic Rent, if applicable, including:
 - a. One copy of the documentation to support all figures used in the Economic Rent computation.
7. One copy of the Tenant Income Verification form (RE-604) if the 30% of income approach is applicable. Include a copy of the appropriate U.S. Department of Housing and Urban Development's Annual Survey of Income Limits for the Public Housing and Section 8 Programs web page highlighted for the project area.
8. One copy of the Decent, Safe and Sanitary Certification form (RE-616).
9. One copy of the Relocation Offer Letter/90-Day Notice Letter (RE-O or RE-T).
10. One copy of the memo to file on a request for Last Resort Housing, if applicable.
11. One copy of the memo to file on a request for the use of Less than Three Comparables, if applicable.
12. One copy of the Assignment Letter when payment is to be made to a third party. The assignment must be signed and dated by both the Displaced Person and the Assignee. The Assignee's tax identification number should also appear on this form.
13. One copy of any Appeal Letter and related documentation, if applicable.
14. One copy of the Relocation Agent's typed notes (RE-615).
15. One copy of any miscellaneous documentation or memos to file in support of payments, as applicable

Patty Moorman

Relocation Unit Manager

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1980 W. Broad St., Columbus, OH 43223
Cell 1-419-551-8716
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Department of Transportation

From: Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 5:01 PM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

2nd page of the RSP and LRH memo has the RSP amount and the LRH information.

Kimber L. Heim

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ODOT – District 5
9600 Jacksontown Road
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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 4:46 PM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: Re: 115989 Memo for Approval of RSP Amount

You have 2 memos that look the same. You are not a trainee. Take that out. Both memos are site descriptions. Did you send wrong ones? I need memo for request for approval.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 4:42:00 PM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: Re: 115989 Memo for Approval of RSP Amount

Call the mom.

I am just looking at everything, but you need corrections on re 600. Square footage, room count. In note, preacq, low move amount is \$5,000 not \$2500

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From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 4:37:59 PM

To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

Well, Patty, Thomas nor Hope's phones are accepting calls per a message you get when you dial the number...so I have texted them both. Do not know if going through and being read.

I will add to my notes. I have spoken to Shields Properties, Helen, and Tami Passwaters the rental agents... Properties are still available and no showings scheduled as of yet, and their application process takes two weeks for Shields, unless someone pays entire year with the application. Tami Passwaters lives in Dublin and due to the weather will not be showing her 947 Moxahala until next week.

Does this excuse us for not getting offer to them within the 7 days?

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 3:16 PM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

How you doing?

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 11:00 AM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

I am reading thru the LRH memo, and the notes...

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 10:49 AM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

Do you need an example of anything?

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 10:48 AM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Cc: Gilmore, Drew <drew.gilmore@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

Wow! Mrs. Patty Moorman your assistance and expertise show in how you worked with my original memo.

Thanks so much for all your patience with this process and training me. I am going to continue to work on the rest of my workbook and memos and get them to you as soon as possible.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 10:12 AM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

I MADE REVISIONS TO THE MEMO. BASED ON THE APPRAISAL. IT SHOULD BE READY TO GO. READ THROUGH IT.

You will need a memo to file requesting approval of the determination, approval of use of Last Resort Housing, which discusses the Non-DS&S condition of the home and your search efforts to locate comparables, how long, that you have already lost comparables due to a fast moving market, etc..

You will need your updated relocation notes –up to today when you are submitting your offer.

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 9:29 AM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

OK, here it is. I printed for myself as well.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 9:20 AM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

Please send me a copy of the appraisal for Thomas/Charlie.
I want to see how the appraiser addresses the square footage and condition of the house—make sure your description match.

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 8:44 AM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

It is on me...I was not forceful, I guess. I told her I had to do additional comp search. I assumed she understood. I discussed with JR, thought he would make sure Greg understood and Megan was told to re-schedule on Friday... That did not happen. Not going to blame her, because I did not send an email telling her to re-schedule.

So, I will work diligently the rest of the day, to get this package's I's dotted and T's crossed...and to you for review.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 8:36 AM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

So she knew on the Wednesday before she made the offer on Saturday, that you were not ready?

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 8:34 AM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

No, I told her on Wednesday that I had to check the comps and if they were available, then when only one comp was still vacant CARROLL Street, I told her I had to get comps and establish RSP. I had conversation with JR no email to back up...about not making the offer on Saturday. There was a Project Update meeting. FMVE had not been set for the other three parcels due to VA not submitted. Sometimes things I request are overlooked because of an unnecessary urgency.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 8:30 AM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

She thought you were making the offer last Friday? Or she had no idea if you were making the offer or not?

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Thursday, January 18, 2024 8:29 AM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

No not until Tuesday was she advised in writing. A phone meeting for updates...on Friday while we were out...so verbal to Greg at best, if JR remembered.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>

Sent: Thursday, January 18, 2024 8:27 AM

To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>

Subject: RE: 115989 Memo for Approval of RSP Amount

That is not the purpose of the letter.

If we go over a few days, not a big deal. You just send me a memo stating the situation asking for forgiveness.

So to be clear, Megan was advised she had to wait for relocation and made the offer anyway? Was she advised in writing?

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From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>

Sent: Thursday, January 18, 2024 8:24 AM

To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>

Subject: RE: 115989 Memo for Approval of RSP Amount

I can present the Relocation Eligibility Letter to Thomas and Hope later today, per the manual that will suffice for the 7 day notice. 6304. Relocation Eligibility Letter.

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From: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Sent: Thursday, January 18, 2024 7:57 AM
To: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Subject: RE: 115989 Memo for Approval of RSP Amount

Yes I can meet with Thomas and Hope. I am a little concerned about the weather forecast.

From: Heim, Kimber <Kimber.Heim@dot.ohio.gov>
Sent: Wednesday, January 17, 2024 4:42 PM
To: Moorman, Patty <Patty.Moorman@dot.ohio.gov>
Subject: 115989 Memo for Approval of RSP Amount

Here is my memo requesting approval for the RSP.

Would you be able to meet Thomas and Hope on Friday in the afternoon?

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