

Section 2.2 FINAL ESTIMATES PRE-PLANNING

2.2.1 PURPOSE

This chapter introduces procedures for the pre-planning of required ***Final Estimates Documentation*** to assist those charged with the responsibility of recording final quantities and preparing final estimates.

2.2.2 GENERAL INFORMATION

Information contained in this chapter presents pre-planning procedures to be used statewide for documenting final pay quantities. It is intended to help construction personnel determine the pay item information that is to be documented, reviewed, and submitted with the ***Final Estimates Documentation*** to the District Final Estimates Office (DFEO).

2.2.3 CONSTRUCTION FIELD OPERATIONS

The Project Administrator (PA) and/or designee responsible for the final estimate must be familiar with the Specifications, method of measurement, and basis of payment for each pay item on the project. Accurate and up-to-date field records must be kept as the project progresses to ensure that final estimates are compiled in an efficient and timely manner.

The following guidelines shall be observed:

- (A) Always check to ensure there is a pay item summary box for each item in the Plans before construction begins. The summary boxes shall show the location, quantity and applicable design notes.
- (B) Verify that the documentation to support each pay item quantity (i.e., electronic shape files, Area IDs, calculations, sketches, or spreadsheets) is included in the Plans Digital Delivery package. (See ***CPAM 5.14, 5.15, and 5.16*** and ***CADD Manual.***)
- (C) Verify the contract information is entered into SiteManager correctly (i.e., pay items, quantities, unit prices, retainage amount, and fuel flag selected when applicable).

- (D) Schedule a final estimates kick-off meeting with the DFEO to review ***Final Estimates Documentation*** requirements. Any question on pay item interpretation, adjustment, extra work, or documentation requirement for any item shall be resolved with the District Final Estimates Manager (DFEM) as it occurs. Do not wait until the end of project.
- (E) Add the contract to the [Final Estimate Status \(FES\)](#) application. The fields on *Contract Information* tab, most importantly the *CEI Name* field, should be completed prior to construction beginning.
- (F) Open project-specific forms via the Construction Automated Reporting System (CARS), send to the Contractor via email or email directly to the collaboration site. Inform the Contractor that all other forms are located on the Construction website and on the Forms and Procedures Office website. Ensure the contractor is aware the latest form version must be utilized regardless of what is provided by email or in the collaboration site.
- (G) Errors in plan quantity items shall be addressed per ***Section 5.13*** of this ***Manual***.
- (H) Final measured items shall be reviewed to determine which type of measurements, sketches, and/or calculations are necessary to document final payment, as well as identify the appropriate site source record to be used. Field Records shall be maintained per ***Section 5.14, 5.15*** and ***5.16*** of this ***Manual***.
 - (1) Once a pay item is included in a progress estimate, supporting documentation for that quantity shall be available electronically in the project files for review (i.e. the collaboration site and/or EDMS).
- (I) Removal items (i.e., existing pavement (if a separate pay item), guardrail, pavement markings, etc.) shall be measured and recorded before that item is removed.
- (J) Decisions regarding earthwork items cross-sections shall be made before clearing and grubbing work has started. Earthwork documentation shall be maintained per ***Section 5.16*** of this ***Manual***.
- (K) Designate the digital file(s) to be used for the Final As-Built Plans prior to the start of construction and update the Final As-Built Plans as the work progresses to support progress payments. Final As-Built Plans shall be separated by component and maintained per ***Section 5.12*** of this ***Manual***.

NOTE: Only final measured pay items shall be final measured. Plan quantity items are not final measured. Only field changes and plan errors to plan quantity items are measured and documented for payment backup.