

13 Semi-Final Estimate Procedures

When all the contract work is finished, the field office will process a semi-final estimate to pay for items that have remaining unpaid quantities and to charge any additional working days, if needed. More than one semi-final estimate can be run. It is important for the field office to complete several checks and ensure certain items have been completed in FieldManager before proceeding with the semi-final estimate process, otherwise you may encounter multiple warning messages along the way. The following list must be addressed prior to producing a semi-final estimate:

- All required information in the General tab of **Docu** icon of the contract must be completed. (Chapter/Section 3.1.1 in this user guide)
- Enter the Time Charges Stop Date (last day time was charged) in the Site Times tab of the **Docu** icon. (Chapter/Section 3. 1.3 in this user guide)
- If additional payments are required, create and generate a Final IDR with the quantities posted to the applicable bid items. If no payments are required, this step may be omitted. (Chapter/Section 7.1 in this user guide).
- All IDRs must be generated. (Chapter/Section 7.4 in this user guide)
- All Daily Diaries for the estimate must be generated. (Chapter/Section 8.4 in this user guide)
- There can be no unattached items. (Chapters/Sections 5.1 & 10.1.4 in this user guide)
- Review all items for accuracy and mark as Complete. (Chapter/Section 5.4 in this user guide)
- Enter the “All Contract Work Completed” date (the date cleanup phase is complete) field in the General folder tab of the **Docu** icon. (Chapter/Section 3.1.1 in this user guide)
- There can be no unapproved contract modifications (excluding those with a status of Deleted). (Chapter/Section 10.4 in this user guide)
- There can be no insufficient materials. (Chapter/Section 6.2 in this user guide)
- All stockpiles, in all categories, must equal zero. This can be done manually (Chapter/Section 9.3 in this user guide) or the “Balance Stockpiles” option, in the Estimates window, while creating the semi-final estimate.

13.1 Creating the Semi-Final Estimate

When all checks and conditions have been made, and the R.E. is satisfied that the final quantities accurately reflect work performed on the project you are ready to run a semi-final estimate.

1. Select the desired contract from the Contracts list window and click **Estimates** on the Application Toolbar (13-1). The Estimates list window opens (Figure 13-2).

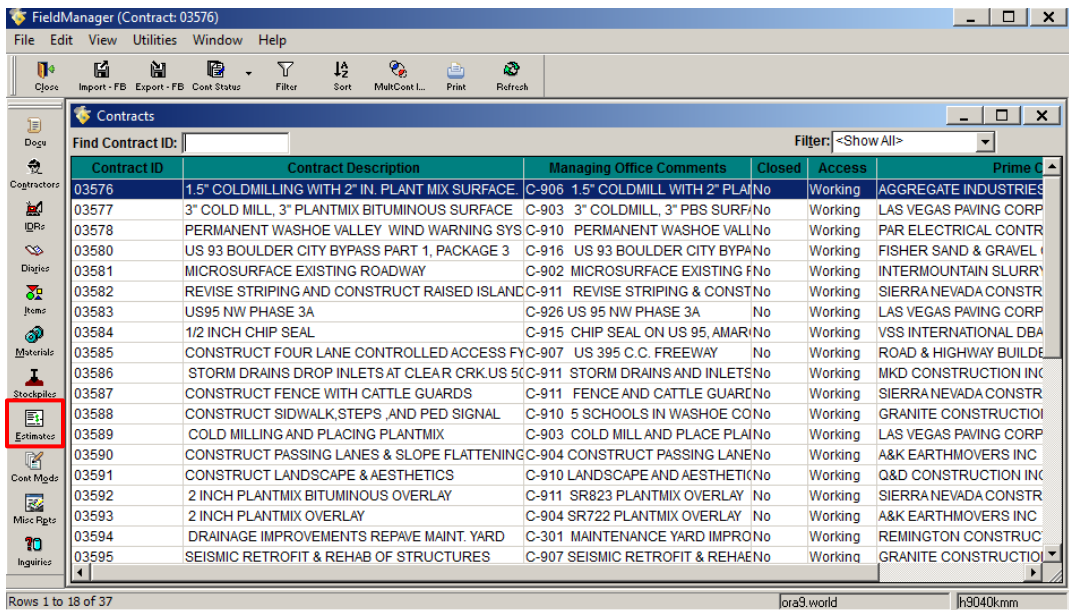


Figure 13-1. FieldManager Contract List Window

2. Select the **Add** button located in the Window Toolbar (Figure 13-2). The Select Estimate Date and Type window opens (Figure 13-3). The estimate date MUST be a cut-off date.

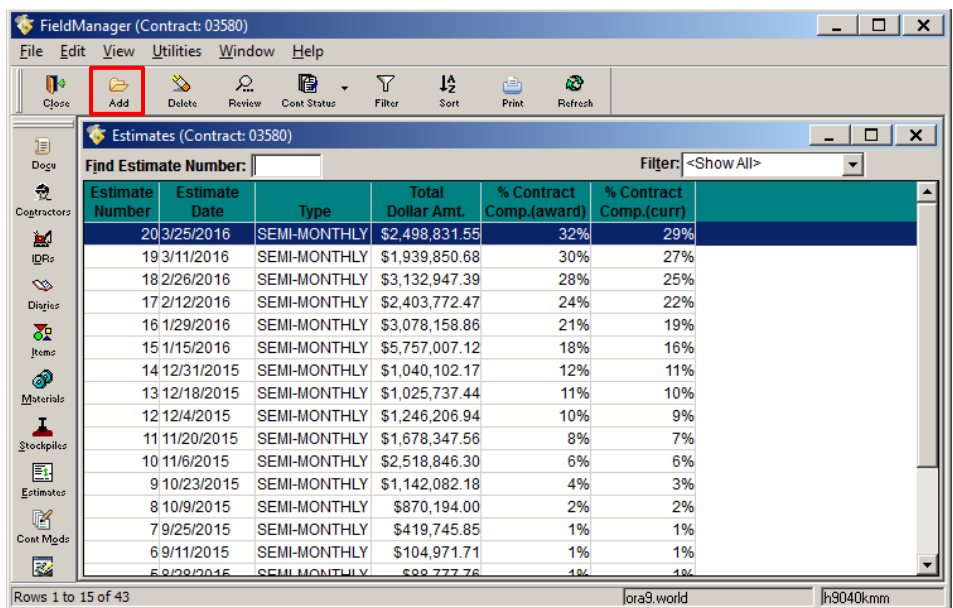


Figure 13-2. Estimates List Window

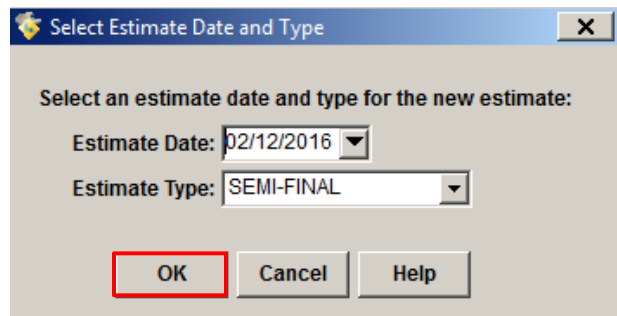


Figure 13-3. Select Estimate Date and Type Window

3. Use calendar drop-down menu to select the Semi-Final estimate date or type it in directly (Figure 13-3).

4. Select the *Estimate Type* of **SEMI-FINAL** from the drop-down list box.
5. Click **OK** to continue (Figure 13-3). The Add Estimate tab window opens with the **General** tab displayed (Figure 13-4).
 - **Note:** The software runs a series of checks and calculations when creating the estimate.

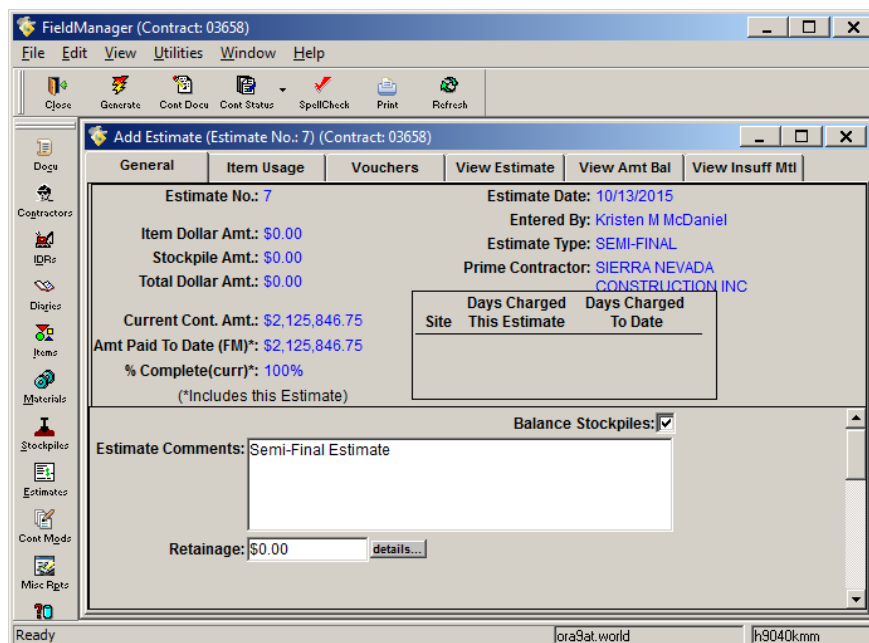


Figure 13-4. Add Estimate Tab Window – General Tab

13.2 Editing and Reviewing the Semi-Final Estimate

1. In the **Estimate Comments** field enter “Semi-Final Estimate” (Figure 13-4).
2. Check the **Balance Stockpile** box if you have stockpiles that do not equal zero (Figure 13-4).
3. Review the **Item Usage** and **View Estimate** tabs for accuracy (Chapter/Sections 11.2.2 and 11.2.4 in this user guide).

13.3 Contractor Item Quantity Review

It is highly recommended that the Resident Engineer provide the contract item quantities paid to date to the prime contractor, so they can review the quantities. The best option for this review is to send a copy of the Semi-Final Construction Pay Estimate Amount Balance Report.

1. Select the **View Amt Bal** tab to open the Construction Pay Estimate Amount Balance Report (Figure 13-5). Print this report to a PDF file and email to the contractor.

Add Estimate (Estimate No.: 7) (Contract: 03658)

General | Item Usage | Vouchers | View Estimate | **View Amt Bal** | View Insuff Mtl

Construction Pay Estimate Amount Balance Report
Estimate: 7

Department of Transportation 10/13/2015 3:17 PM
FieldManager 5.2a

Contract: 03658, TEST FOR 5.2 UPGRADE (FIELDMANAGER)
Project: 60658C1C, PATCH & CHIP SEAL

Category: 01, PATCH, CHIP SEAL

| Prop. Line | Item Description | Item Code | Authorized Qty. | Unit | Quantity This Estimate | Qty Paid To Date | Total Qty Placed | % Cpt | Unit Price | Dollar Amt. Paid To Date |
|------------|--|-----------|-----------------|------|------------------------|------------------|------------------|-------|------------|--------------------------|
| 0005 | REMOVAL OF BITUMINOUS SURFACE (COLD MILLING) | 2020990 | 10,500.000 | SQYD | | 10,500.000 | 10,500.000 | 100% | 2.35000 | \$24,675.00 |
| 0010 | PLANTMIX SURFACING (TYPE 2)(WET) | 4020180 | 2,000.000 | TON | | 2,000.000 | 2,000.000 | 100% | 135.00000 | \$270,000.00 |
| 0015 | EMULSIFIED ASPHALT,TYPECQS-1NV (DILUTED) | 4070218 | 150.000 | TON | | 150.000 | 150.000 | 100% | 500.00000 | \$75,000.00 |
| 0020 | SAND BLOTTER | 4070240 | 0.000 | TON | | 0.000 | | | 0.01000 | |
| 0025 | EMULSIFIED ASPHALT, TYPE CRS-2NV | 4080220 | 1,611.700 | TON | | 1,611.700 | 1,611.700 | 100% | 0.01000 | \$16.12 |

Figure 13-5. Construction Pay Estimate Amount Balance Report

- **Note: Other Options for Quantity Review by Contractor:**
If your contractor has FieldManager Read-Only, provide a read-only copy of the contract after generating your Semi-Final estimate (Chapter/Section 14.1 in this user guide).

Refer the contractor to the NDOT website: <https://www.nevadadot.com/doing-business/about-ndot/ndot-divisions/operations/construction/fieldmanager>

2. If the contractor does not agree with the quantities, the Resident Engineer must reconcile the difference and if changes are needed do so through an IDR with adjusted posting to item(s) then create and Generate another Semi-Final estimate.

13.4 Generating and Printing the Semi-Final

1. Once you have checked all the information and are sure the estimate is correct, click **Generate** on the Window Toolbar (Figure 13-6). You will receive a Generate Window (Figure 13-7).
 - **Note:** If you attempt to close the Add Estimate window before generating the estimate the software displays a warning message. If you close the Add Estimate window without generating the estimate, all the information entered while processing the estimate will be lost.

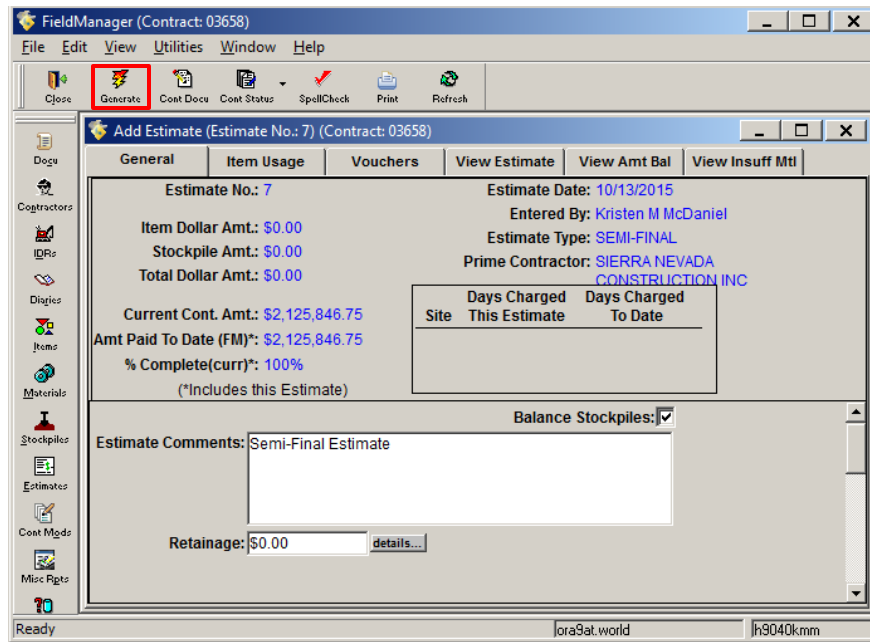


Figure 13-6. Add Estimate Tab Window – General Tab

2. Click the **Yes** button on the Generate Window (Figure 13-7).

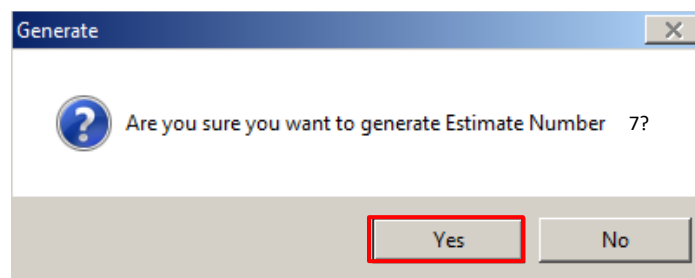


Figure 13-7. Estimate Generate Confirmation Window

3. The Print Dialog box opens for each of the estimate reports (Figure 13-8). The **Construction Pay Estimate** report is **REQUIRED to be printed, signed and filed in Division 7**.



Figure 13-8. Estimate Reports Print Dialog Box

4. Click on **Print** or **Cancel** for the other reports depending on if you want a hard copy.

- **Note:** If your Prime Contractor has a licensed copy of FieldManager Read-Only you will need to export a copy of the contract each time you generate an estimate. See Chapter/Section 14.1 in this user guide for details.
- **Note:** Create the Closeout Contract Modification (refer to Chapter/Section 10.7 in this user guide). Notify HQ Construction Admin Services staff when Draft has been created.