

ELECTRONIC PROGRESS ESTIMATE FORM PUBLIC USER GUIDE

Link to Public Electronic Progress Estimate Form: https://apps.nd.gov/cm/progress_estimate.seam

OVERVIEW OF FORM

The electronic progress estimate form replaces the pdf form previously used by Consultants. The electronic form consists of 5 tabs.

- The Basic tab contains the basic information about the contract and Consultant submitting the bill.
- The Contract & Payment Information tab is a summary of the current bill and previous payments submitted.
- The Summary of Prime Consultant tab contains the details for the Prime Consultant's bill.
- The Summary of Subconsultant tab consists of the details of the Subconsultant's bill.
- The Attachments tab contains the invoices for Prime Consultant, Subconsultant and receipts for employee expenses.

All tabs that are applicable must be completed by the Consultant with the appropriate documentation attached to submit the form to ND DOT.

On each tab, the fields displayed in gray are automatically filled when the contract number is entered, if that information exists on our contract record. The fields displayed in white should be completed by the consultant or ND DOT.

DETAILED INSTRUCTIONS

BASIC TAB

Progress Estimate Status: Draft

Basic | Contract & Payment Information | Summary of Prime Consultant | Summary of Subconsultant | Attachments

Final Payment

* Estimate Number * Contract Number PCN

* Name * Address Project Number

* City * State * Zip

Add'l PCN Add'l Project Number * Invoice Number

* Invoice Date Contract Date * Invoice Period Start Date

* Invoice Period End Date * Contract Type PE CE * DOT Technical Representative

* Preparer Signature * Signature Date

* Title Signature Date

DOT Designee

Remarks

1. Enter the Estimate Number and check the box at the top if this is the final payment. If it is not the final payment leave the box unchecked.
2. Input the Contract Number. It can be found in the top right hand corner of your contract. The PCN, Project Number and Contract Date should auto fill for you, if applicable.

- Input the information for all required fields. This includes Name, Address, City, State, Zip, Invoice Number, Invoice Date, Invoice Period Start Date and End Date, Contract Type and DOT Technical Representative. Preparer Signature (typed), Signature Date and Title are also required. DOT Designee and Date will be completed at the DOT.
- Add'l PCN and Add'l Project Number are only used if your contract has more than one project assigned to that contract number.

CONTRACT & PAYMENT INFORMATION TAB

Progress Estimate		Status: Draft	
Contract & Payment Information			
Total Contract Amount	2,500,000.00	Total Work Done to Date	155,096.00
Total Prime	2,000,000.00	Audit Adjustment(inc/(dec))	0.00
Total Subconsultant Amount	500,000.00	Retainage 1.00% to Date	140.00
Remaining Amount	2,344,904.00	Previous Retainage	0.00
Contract Prime Profit	200,000.00	Retainage This Estimate	140.00
Previous Billed Profit (Prime)	0.00	Total Due to Date	154,956.00
Current Invoice Profit (Prime)	14,000.00	Previous Payments	0.00
Total Profit to Date (Prime)	14,000.00	Payment Due this Estimate	154,956.00
Total Profit % to Date	7.00 %		
Remaining Prime Profit	186,000.00		

- Complete the Previous Billed Profit (Prime), Total Work Done to Date, Previous Retainage and Previous Payments. The other fields should calculate or auto fill from the contract information.

SUMMARY OF PRIME CONSULTANT TAB

Progress Estimate		Status: Draft	
Summary of Prime Consultant			
Indirect Cost Rate	1.43259 %	Prime Direct Labor X Indirect Cost Rate	140,000.00
Profit Percentage	10.00 %	Prime Consultant Profit	14,000.00
Prime Direct Expenses	100.00	Prime Direct Other Expenses	0.00
Prime ROW	0.00	Prime Consultant Subtotal	155,096.00
Subconsultant Subtotal	0.00	Payment Due this Estimate	155,096.00
<hr/>			
Meals Per Day	75.00	Number of Days	5
		Maximum Meals	375.00
		Total Meals	375.00
Lodging Per Day	100.00	Number of Days	5
		Maximum Lodging	500.00
		Total Lodging	495.00
<hr/>			
Survey Mileage Per Mile	0.42	Number of Miles	100
		Total Survey Mileage	42.00
Vehicle Mileage Per Mile	0.42	Number of Miles	200
		Total Vehicle Mileage	84.00

- Input Prime Direct Labor X Indirect Cost Rate
- Input Prime Consultant Profit, if applicable.
- Enter Prime Direct Expenses, if necessary (This is for direct expenses; rental cars, paper copies, mail, etc...not for meals, lodging and mileage).
- Input Prime Direct Other Expenses, if applicable (This is for airplane tickets and other expenses not put in the Prime Direct Expense box).
- Add Prime ROW, if needed (firms will be required to break out their ROW costs as a separate pay item).
- Input the Number of Days for Meals and Lodging which will calculate the maximum expense that can be entered. Then input the Total Meals and Total Lodging dollar amounts. You cannot submit the form if the totals are higher than the maximum allowed for the number of days entered. (This implies the number of stays in hotels-not so much number of days).

- Enter the Number of Miles for Survey and Vehicle Mileage. It will calculate the total dollar amounts of each for you.

SUMMARY OF SUBCONSULTANT TAB

Progress Estimate					Status: Draft
Summary of Subconsultant					
* Firm Name	Labor	Direct Costs	Profit	Total Invoice	
subconsultant 1	5,000.00	100.00	500.00	5,600.00	✘
subconsultant 2	10,000.00	300.00	1,000.00	11,300.00	✘
Total Labor	15,000.00	Total Direct Costs	400.00	Total Profit	1,500.00
				Total Invoice	16,900.00

- Click on the plus icon  at the end of the heading row to add rows.
- Complete the Firm Name, Labor, Direct Costs and Profit, if applicable. (note; if sub does not break out their direct labor or profit put total invoice amount in the Direct Cost box and leave Labor and Profit at zero).
- Continue clicking the plus icon  to add the needed rows for each Subconsultant billing assigned to the project.
- Tabbing through the fields will total each invoice line and the grand totals at the bottom. The Total Invoice field for all Subconsultants will also flow to the Summary of Prime Consultant tab.

ATTACHMENTS TAB

Progress Estimate				Status: Draft
Attachments				
File Name	Attachment Type	Created Time	Remove	
13303818-primenameanddate.pdf	CONSULTANT_INVOICE	12/05/2013 03:03 PM	✘	
13303818-subname2anddate.pdf	SUBCONSULTANT_INVOICE	12/05/2013 03:03 PM	✘	
13303818-subnameanddate.pdf	SUBCONSULTANT_INVOICE	12/05/2013 03:03 PM	✘	
13303818-employeeetailanddate.pdf	CONSULTANT_EMPLOYEE_RECEIPTS	12/05/2013 03:03 PM	✘	

Upload Attachment

- Prime Consultant Invoices, Subconsultant Invoices and Employee Receipts should all be scanned separately to add to the electronic progress estimate. They should not be combined into one file.
- Click on Upload Attachment button and use the drop down arrow to select the type of attachment
 - * Attachment Type
- Click on Add  and browse to the appropriate file
- Select the next attachment type, then click Add and browse to the file.
- Repeat steps 2-4 until all files are uploaded.
- Click on the Return button  and review the list of documents to ensure that all files are attached.

Upload Attachment 

* Attachment Type

+	Add...	✘ Clear All
	O:\81 Special Projects\Contract Management\CM Training\ Done	Clear
	O:\81 Special Projects\Contract Management\CM Training\ Done	Clear
	O:\81 Special Projects\Contract Management\CM Training\ Done	Clear

Submit and Print the Progress Estimate

1. Verify that all fields are completed and the Payment Due this Estimate on the Contact & Payment Information tab matches the Payment Due this Estimate on the Summary of Prime Consultant tab.

Progress Estimate  

Basic | Contract & Payment Information | **Summary of Prime Consultant** | Summary of Subconsultant | Attachments

Total Contract Amount	100,000.00	Total Work Done to Date	7,134.48
Total Prime	90,000.00	Audit Adjustment(inc/(dec))	0.00
Total Subconsultant Amount	10,000.00	Retainage 0.00% to Date	0.00
Remaining Amount	92,865.52	Previous Retainage	0.00
Contract Prime Profit	9,000.00	Retainage This Estimate	0.00
Previous Billed Profit (Prime)	438.79	Total Due to Date	7,134.48
Current Invoice Profit (Prime)	10.59	Previous Payments	4,877.90
Total Profit to Date (Prime)	449.38	Payment Due this Estimate	2,256.58
Total Profit % to Date	4.99 %		
Remaining Prime Profit	8,550.62		

Progress Estimate  

Basic | Contract & Payment Information | **Summary of Prime Consultant** | Summary of Subconsultant | Attachments

Indirect Cost Rate	1.88000 %	Prime Direct Labor X Indirect Cost Rate	59.95
Profit Percentage	11.00 %	Prime Consultant Profit	10.59
Prime Direct Expenses	36.33	Prime Direct Other Expenses	0.00
Prime ROW	0.00	Prime Consultant Subtotal	106.87
Subconsultant Subtotal	2,149.71	Payment Due this Estimate	2,256.58

2. Click the Green Submit button  at the top.
3. If necessary, fix any errors displayed and click the Green Submit button again until all errors are corrected.
4. Click on the Printer button  at the top to print to a pdf. This will open the form in Adobe Acrobat and then can be saved or printed to a printer.

Progress Estimate   Status: Draft

Basic | Contract & Payment Information | **Summary of Prime Consultant** | Summary of Subconsultant | Attachments

Click Submit Button to send to ND DOT

Click Print Button to open a pdf of form

5. Once estimate has been submitted to the NDDOT, they will process it. If there are errors in the information provided, the DOT will send an email to the Preparer for corrections. You will have to start the procedure over using the saved firm's copy of the estimate and resubmit with corrections.
6. If you have problems call Ron Peck at 701-328-4927 for help.