

# ELECTRONIC PROGRESS ESTIMATE FORM

## PUBLIC USER GUIDE

Link to Public Electronic Progress Estimate Form: [https://apps.nd.gov/cm/public/progress\\_estimate.seam](https://apps.nd.gov/cm/public/progress_estimate.seam).  
The form is compatible with Internet Explorer 10 and up, Chrome and Firefox.

### 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.

Data cannot be entered in any of the gray fields. Some of the white fields will also populate data from the contract information but you can make corrections to those fields, if necessary.

The save button at the top will allow you to save the progress estimate if you are not ready to submit and email a link to yourself. Submit will send the progress estimate to the ND DOT and Print will generate a pdf report of the completed progress estimate for your records.

### DETAILED INSTRUCTIONS

#### BASIC TAB

Save Submit Print Status: DRAFT

Progress Estimate : 1

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

Final Payment

* Estimate Number	1	* Contract Number	07160041	PCN	2563
* Name	Prime Consultant Name	* Address	your address	Project Number	SAP-6-002(000)295
* City	Some City	* State	ND	* Zip	58501
Add'l PCN		Add'l Project Number		* Invoice Number	123456
* Invoice Date	07/12/2017	Contract Date	10/25/2016	* Invoice Period Start Date	05/01/2017
* Invoice Period End Date	05/31/2017	* Contract Type	<input checked="" type="radio"/> PE <input type="radio"/> CE	* DOT Technical Representative	Ron Peck

* Preparer Signature	Submitter Signature	* Signature Date	07/12/2017
* Title	Submitter's Title		
* Consultant Email	submitteremail@mycompany.com		
DOT Designee		Signature Date	MM/dd/yyyy

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, Contract Date, Name, Address, City, State, Zip and Technical Rep should auto fill from the contract number.
3. Input the information for all required fields. This includes Invoice Number, Invoice Date, Invoice Period Start Date and End Date, and Contract Type. Preparer Signature (typed), Signature Date, Title, and Consultant Email are also required. Update Name, Address, City, State, Zip, if necessary. DOT Designee and Date will be completed at the DOT.
4. 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

Basic	Contract & Payment Information	Summary of Prime Consultant	Summary of Subconsultant	Attachments
Total Contract Amount	1,000,000.00	Total Work Done to Date	50,000.00	
Total Prime	987,500.00	Audit Adjustment(inc/(dec))	0.00	
Total Subconsultant Amount	12,500.00	Retainage % to Date	0.00	
Remaining Subconsultant Amount	12,500.00	Previous Retainage	0.00	
Remaining Amount	950,000.00	Retainage This Estimate	0.00	
Contract Prime Profit	10,000.00	Total Due to Date	50,000.00	
Previous Billed Profit (Prime)	0.00	Previous Payments	0.00	
Total Profit to Date (Prime)	0.00	Payment Due this Estimate	50,000.00	
Total Profit % to Date	0.00			
Remaining Prime Profit	10,000.00			

1. Complete the Total Work Done to Date, Audit Adjustment, Previous Retainage and Previous Payments as needed. The other fields should calculate or auto fill from the contract information.

### SUMMARY OF PRIME CONSULTANT TAB

Basic	Contract & Payment Information	Summary of Prime Consultant	Summary of Subconsultant	Attachments
Indirect Cost Rate	1.81520	Prime Direct Labor X Indirect Cost Rate	35,000.00	
Profit Percentage	0.10	Prime Consultant Profit	350.00	
Prime Direct Expenses	0.00	Prime Direct Other Expenses	0.00	
Prime ROW	768.45	Prime Consultant Subtotal	43,500.00	
Subconsultant ROW	1,000.00	Payment Due this Estimate	50,000.00	
Subconsultant Subtotal	5,500.00			

Meals Per Day	35.00	Number of Days	39	Maximum Meals	1,365.00	Total Meals	1,365.00
Lodging Per Day	120.00	Number of Days	42	Maximum Lodging	5,040.00	Total Lodging	5,040.00

Survey Mileage Per Mile	0.620	Number of Miles	520	Total Survey Mileage	322.40
Vehicle Mileage Per Mile	0.623	Number of Miles	1050	Total Vehicle Mileage	654.15

1. Input Prime Direct Labor X Indirect Cost Rate
2. Input Prime Consultant Profit, if applicable.
3. Enter Prime Direct Expenses, if necessary (This is for direct expenses; rental cars, paper copies, mail, etc...not for meals, lodging and mileage).
4. Input Prime Direct Other Expenses, if applicable (This is for airplane tickets and other expenses not put in the Prime Direct Expense box).
5. Add Prime ROW, if needed (firms will be required to break out their ROW costs as a separate pay item). The subconsultant ROW is broke out on the Subconsultant tab so do not include it with the Prime ROW.
6. 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).
7. 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

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

Firm Name	ROW	Labor	Direct Costs	Profit	Total Invoice	
Subconsultant 1	1,000.00	500.00	650.00	50.00	2,200.00	Delete
Subconsultant 2	0.00	3,000.00	1,000.00	300.00	4,300.00	Delete

1. Click on Add new record at the top to add rows.
2. 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).
3. Continue clicking the Add new record to add the needed rows for each Subconsultant billing assigned to the project. All invoices for the same subconsultant can be summarized and entered on one line.
4. 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

Save Submit Print Status: DRAFT

Progress Estimate : 1

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

File Name	Attachment Type	Content Type	Created Time	
1000000095-20170201.pdf	SUBCONSULTANT_INVOICE	PDF	2017-07-12	Delete
1000000095-11072013.pdf	CONSULTANT_INVOICE	PDF	2017-07-12	Delete
1000000095-05012014.pdf	CONSULTANT_EMPLOYEE_REC...	PDF	2017-07-12	Delete

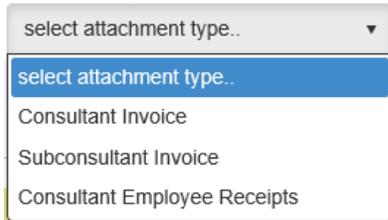
1 - 3 of 3 items

\* Attachment Type Consultant Employee Receipts Select files... Done

Click **Select files** to start upload a new document. Attachment Type must be provided before uploading.

1. 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



- Click on  and browse to the appropriate file
  - Click  before selecting another attachment type.
  - Select the next attachment type, then click Select files... and browse to the file.
  - Repeat steps 2-5 until all files are uploaded.
7. Review the list of documents to ensure that all files are attached.

**Submit and Print the Progress Estimate**

- 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.

Basic

Total Contract Amount	1,000,000.00	Total Work Done to Date	50,000.00
Total Prime	987,500.00	Audit Adjustment(inc/(dec))	0.00
Total Subconsultant Amount	12,500.00	Retainage % to Date	0.00
Remaining Subconsultant Amount	5,000.00	Previous Retainage	0.00
Remaining Amount	950,000.00	Retainage This Estimate	0.00
Contract Prime Profit	10,000.00	Total Due to Date	50,000.00
Previous Billed Profit (Prime)	0.00	Previous Payments	0.00
Total Profit to Date (Prime)	350.00	Payment Due this Estimate	50,000.00
Total Profit % to Date	3.50		
Remaining Prime Profit	9,650.00		

Basic

Indirect Cost Rate	1.81520	Prime Direct Labor X Indirect Cost Rate	35,000.00
Profit Percentage	0.10	Prime Consultant Profit	350.00
Prime Direct Expenses	0.00	Prime Direct Other Expenses	0.00
Prime ROW	768.45	Prime Consultant Subtotal	43,500.00
Subconsultant ROW	1,000.00	Payment Due this Estimate	50,000.00
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Survey Mileage Per Mile	0.620	Number of Miles	520	Total Survey Mileage	322.40
Vehicle Mileage Per Mile	0.623	Number of Miles	1050	Total Vehicle Mileage	654.15

- Click the Submit button  at the top.
- If necessary, fix any errors displayed and click the Submit button again until all errors are corrected and the progress estimate is sent.
- Click on the Print 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.

5. If at any time, you need to close the progress estimate without finishing, click the Save button to email yourself a link to the form to finish later. The form will be saved for 7 days. The email option works with Microsoft Outlook.



6. 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.
7. When filling out tabs, if grayed out numbers are incorrect because of a WAR or supplement, notify CAS to update amounts. Then complete and submit the progress estimate after the updates. Do not submit if the amounts are not correct.
8. If you have problems call Ron Peck at 701-328-4927 for assistance.