

Estimate Reference Information

Project and Program Delivery Manual
Chapter 5
Estimating Chapter
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Plan items often have an estimate reference note. The estimate reference information should refer the contractor to the appropriate tabulation, Standard Road Plan, Detail sheet, or Typical Cross Section sheet. When any of the five parts of the Specifications are not covered, they should be included in the Estimate Reference Information.

If special notes are necessary for a project, they should be placed in the estimate reference information for the plan items that are affected, regardless of the note's presence elsewhere in the plan set.

Estimate reference information can be added to individual plan items by marking the checkbox next to a plan item and clicking "Edit".

The screenshot shows the Masterworks software interface. On the left is a navigation pane with categories like 'Recent Projects', 'Project Phases', 'My Tasks (0)', 'Resource Management', 'Schedule', 'Schedule Task Request', 'Documents', 'Document Search', 'Budget Management', 'Bid Estimate Information', and 'Commitments & Expenses'. The 'Plan Items' sub-category under 'Bid Estimate Information' is selected. The main area is titled 'ITEM LIST' and contains a table with columns: Name, Item Description, Suppl. Descriptions, and Unit. The table lists several item categories: Roadway Items, Roadside Items, Erosion Control Items, Traffic Sign Items, Traffic Signal Items, Landscaping Items, and Demonstration. The item '2102-2710070' is highlighted in blue, and its checkbox is checked and highlighted with a red box. The item description for this entry is 'EXCAVATION, CLASS 10, ROADWAY AND BORROW' and the unit is 'CY'. Another item, '2301-1004095', is listed below it with a description of 'STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 9.5 IN.' and unit 'SY'.

Name	Item Description	Suppl. Descriptions	Unit
<input type="checkbox"/> Roadway Items	Roadway Items		
<input type="checkbox"/> Roadside Items	Roadside Items		
<input type="checkbox"/> Erosion Control Items	Erosion Control Items		
<input type="checkbox"/> Traffic Sign Items	Traffic Sign Items		
<input type="checkbox"/> Traffic Signal Items	Traffic Signal Items		
<input type="checkbox"/> Landscaping Items	Landscaping Items		
<input type="checkbox"/> Demonstration			
<input checked="" type="checkbox"/> 2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW		CY
<input type="checkbox"/> 2301-1004095	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 9.5 IN.		SY

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The Edit Plan Item form will open. Default Estimate Reference Information for the plan item will appear in the “Notes” field. The designer should thoroughly read the default notes and edit the information as necessary to match the intent of the plans. When finished editing the estimate reference information, click “Save & Exit” at the top of the screen.

The screenshot displays the Masterworks software interface. On the left is a navigation pane with a search bar and a list of project categories including Recent Projects, Project Phases, My Tasks, Resource Management, Schedule, Documents, Budget Management, Bid Estimate Information, Plan Items, and Bid Estimate Report Gallery. The main area is titled 'EDIT PLAN ITEM' and contains various input fields: Container (Root/Demonstration), Pay Item No. (2102-2710070), Description (EXCAVATION, CLASS 10, ROADWAY AND BORROW), Unit (CY), Budget Item (with a Clear button), Funding Rule (Select), Suppl. Description Mandatory (checkbox), Suppl. Description 1, 2, and 3, Method of Measurement/Basis of Payment (S), Major (checkbox), Obsolete (checkbox), Alternate (Base Bid), Quantity (0), and Amount in \$ (0.00). At the bottom, it shows 'Total Item Estimate in \$: 0.00'. A red box highlights the 'Save & Exit' button at the top. Another red box highlights the 'Notes' field, which contains the following text: 'Includes _____ cu. yds. of suitable material to be used in the roadway fill. Includes _____ cu. yds. of Unsuitable Type "B" material of which _____ cu. yds. is needed for roadway fill and _____ cu. yds. to be wasted according to Article 1106.07 of the Standard Specifications. Also includes _____ cu. yds. of Unsuitable Type "C" material to be used in the roadway fill. Refer to T Sheets.'



NOTE: Default Estimate Reference Information should be reviewed and edited to match the design intent for the project.
(Refer to Design Manual Chapter 01G-01 Bid Item Determination and Quality Estimation)

Chronology of Changes to Manual Section:

5.2.1.4 Estimate Reference Information

11/07/2024	NEW
07/28/2025	Removed broken hyperlinks.
09-03-2025	Removed Header on pages. Check Accessibility.