



## *Florida Department of Transportation*

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### **ESTIMATES BULLETIN 09-06**

DATE: October 23, 2009

TO: District Estimates Coordinators, District Design Engineers

FROM: Phillip Greg Davis, State Estimates Engineer

A handwritten signature in black ink that reads "Phillip G. Davis".

COPIES TO: Lora Hollingsworth, Duane Brautigam

SUBJECT: Generic Pay Items

### **ISSUE BACKGROUND:**

Generic pay items are general-use pay items that are defined by a pay item supplemental description on a project by project basis in the Trns•port system. They are intended to support one-time usage pay items or specialty situations where a standard pay item is not available, and for which it is not practical to create a new pay item.

### **IMPLEMENTATION:**

Please refer to the attached *Guidelines for Usage of Generic Pay Items* for complete information, including the objective, rules, roles, and process.

If you have any questions regarding the use of the above items, please contact Greg Davis at 850-414-4170.

Florida Department of Transportation

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# **Guidelines for Usage of Generic Pay Items**

*A General Guide for Proper Selection and Usage, Including  
Rules and Roles Associated with Generic Pay Items*

October 23, 2009

# GUIDELINES FOR GENERIC PAY ITEMS

## PURPOSE AND DEFINITION:

Generic pay items are general-use pay items for each design group (component set of plans) that are defined by a pay item supplemental description on a project by project basis in the Trns•port system. They are intended to support one-time usage pay items or specialty situations where a standard pay item is not available, and for which it is not practical to create a new pay item. A single generic pay item number can be used many times, but only once per project/proposal; each time it is used the appropriate descriptive information must be included in Trns•port.

*Since these items are for unique situations, tracking of cost history for future estimation purposes is not necessary.*

## OBJECTIVES:

Generic pay items are intended to:

- Facilitate the use of one-time or limited-use non-standard work items.
- Provide more flexibility in Utilities pay item structure.

## CUSTOMERS:

The key users of generic pay items are:

- District/Consultant Designers
- Construction Personnel
- Utility Agencies

## RULES:

The following rules apply in the usage of generic pay items:

- Must not be used if there is an existing pay item.
  - Must not be used to violate or circumvent standard pay items; EXCEPTION: Utility pay items.
  - Must not be used to circumvent the approval process (for specification usage) on developmental items.

- Must not be used as a standard means to work-around a pay item that has been rejected for statewide usage by Central Office.
  - For unique situations, an item rejected for statewide usage may be used as a one-time generic pay item.
  - Not to be used for sole-sourcing of materials/methods for items of work.
- Must not be used to circumvent the pay item request process if the pay item should be opened for statewide usage.
- Must be supported by a technical special provision and/or plan details (drawings or notes) that include clear definition of work and payment.
- Must be loaded in Trns•port under the appropriate category.

## **ROLES:**

It is important that everyone involved in the pre-letting and post-letting processes understands and fulfills their respective responsibilities regarding generic pay items:

- **Designer** – Designers are responsible for:
  - Determining if a generic pay item is needed;
  - Developing the technical special provision, or ensuring it has been developed;
  - Ensuring all necessary details are included in the contract documents.
- **District Estimates Staff** – District Estimates Staff are responsible for :
  - Determining if a standard pay item should be requested for statewide usage;
  - Entering the following information in Trns•port PES:
    - Completing the description of the pay item by entering the Supplemental Proposal Description, with unit of measure included in the description;
    - Quantity (may be entered by the designer);
    - Estimated Unit Price.
- **Central Office Project Review Team** – The CO Project Review staff will perform a Quality Assurance review of generic pay items after the letting, but they *will not perform a Quality Control review* of generic pay items prior to the letting. On a quarterly basis, they are responsible for performing a review of generic pay items that were used on projects that were let during the previous quarter:

- Run the Pay Item Future Search report to determine if any generic pay items were used during the previous quarter;
- Check for proper details and plan notes in contract documents;
- Check for correct information in Trns•port:
  - Verify description of the generic pay item has a Proposal Supplemental Description, with unit of measure;
  - Verify generic items have been loaded in the correct category;
- Coordinate with responsible design office if usage of generic pay item is questionable (usage does not appear to abide by the usage “Rules” as described in this document).

## **PROCESS:**

The process that is to be followed when generic pay items are used is as follows:

- District identifies work that is appropriate for a generic pay item, but must not violate the rules;
- Designer includes all supporting details for the generic pay item in the contract documents;
- Designer loads generic pay item into Trns•port via the Designer Interface, and supplies the District Estimates staff with the pay item supplemental description.
- District Estimates staff loads supplemental description and units for generic pay item into Trns•port (Designers do not have access to this description field in PES via the Designer Interface).

## **QUALITY CONTROL :**

Districts assume all responsibility for proper usage of generic pay items. No approvals from Central Office will be required; no Quality Control reviews will be performed by Central Office.

## **QUALITY ASSURANCE:**

Quarterly post-letting reviews of generic pay items will be performed by the Central Office Project Review team. The team will check for:

- Representative Supplemental Proposal Description, with unit of measure, exists in Trns•port;
- Inclusion of complete documentation in the contract package.

The responsible office, Central Office Design personnel, may be consulted to verify appropriate usage.

## **PAY ITEM STRUCTURE AND DESCRIPTION:**

Generic pay items are structured as:

### **0000-A00-BBB**

A = Design Group/Trns•port Category (100 for Structures, 200 for Roadway, etc.)

B= Sequential Number that can be re-used

Note: *Zeros are hard-coded; they are NOT blanks.*

- There are a minimum of 10 generic pay items available in each Trns•port design group. If additional generic items are needed, they can be requested through Central Office Design, and will be opened through an expedited process without delay.
- The default unit of measure (in Trns•port) for all generic pay items is ZZ. The actual unit of measure must be keyed into Trns•port with the project-specific description being added at the end of the Supplemental Proposal (Pay Item) Description.
- Example:

0000-600- 1	LANDSCAPE DESIGN GROUP- GENERIC PAY ITEM1 (SMALL	ZZ	
	TREE TRIMMING - EA)		

## TRNS•PORT PES:

The Supplemental Proposal (Pay Item) Description and unit of measure are entered into PES as in the following example:

Proposal E2M51-R0									
General		Sites	Projects	Special Provisions	Sections	Items		FY Schedule	Attachments
Prop. Line No.	Item	Description	Units	Lump Sum	Quantity	Price	Extended Amount	Supplemental Proposal Description	
0005	0000600 1	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 1	ZZ		100.000	70.86000	7,066.00000	SMALL TREE TRIMMING - EA	
0010	0000600 2	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 2	ZZ		100.000	105.00000	10,500.00000	LARGE TREE TRIMMING - EA	
0015	0000600 3	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 3	ZZ		500.000	52.99000	26,495.00000	PALM TREE TRIMMING - EA	
0020	0000600 4	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 4	ZZ		4840.000	4.90000	23,716.00000	RECYCLED FERTILIZER - SY	
0025	0000600 5	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 5	ZZ		4840.000	5.59000	27,055.60000	PRE-EMERGENT HERBICIDE - SY	
0030	0000600 6	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 6	ZZ		4840.000	9.89000	47,867.60000	POST-EMERGENT HERBICIDE - SY	
0035	0000600 7	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 7	ZZ		4840.000	4.50000	21,780.00000	MULCH - SY	
0040	0000600 8	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 8	ZZ		4840.000	14.88000	72,019.20000	LANDSCAPE SOIL - SY	
0045	0000600 9	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM 9	ZZ		500.000	325.00000	162,500.00000	SABAL PALM - EA	
0050	0000600 10	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM10	ZZ		500.000	215.00000	107,500.00000	BALLED AND BURLAPPED TREE - EA	
0055	0000600 11	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM11	ZZ		500.000	650.00000	325,000.00000	30 GALLON TREE - EA	
0060	0000600 12	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM12	ZZ		500.000	325.00000	162,500.00000	15 GALLON TREE - EA	
0065	0000600 13	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM13	ZZ		500.000	195.00000	97,500.00000	7 GALLON TREE - EA	
0070	0000600 14	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM14	ZZ		1000.000	25.00000	25,000.00000	3 GALLON SHRUB - EA	
0075	0000600 15	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM15	ZZ		1000.000	15.00000	15,000.00000	1 GALLON SHRUB - EA	
0080	0000600 16	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM16	ZZ		10000.000	25.00000	250,000.00000	1 GALLON ORNAMENTAL GRASS - EA	
0085	0000600 17	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM17	ZZ		30.000	500.00000	15,000.00000	PINDO PALM - EA	
0090	0000600 18	LANDSCAPE DESIGN GRP- GENERIC PAY ITEM18	ZZ		10.000	8,000.00000	80,000.00000	MEDJOOI DATE PALM - EA	

Default for Pay Item Number
 Keyed In for Specific Project

The Description will be filled with the generic description that is associated with the pay item number in the master pay item list, and the unit of measure will always be ZZ by default. The District Estimates staff will enter the quantity (may be entered by the designer), unit price and Supplemental Proposal (Pay Item) Description with unit of measure as determined appropriate by the District personnel responsible for the project's design.

## NON-UTILITIES PAY ITEMS:

When using a generic pay item for non-Utilities work, caution must be taken to ensure that a standard pay item is not appropriate for the conditions.

Generic pay items can be used for non-Utilities work to:

- Specify details of a lump sum pay item:

0580- 1- 1	LANDSCAPE COMPLETE - SMALL PLANTS	LS
↓		
0000-600- 1	LANDSCAPE DESIGN GROUP- GENERIC PAY ITEM1 (AZALEAS)	ZZ

- Include a one-time usage item, or an item that is unique to the project:

0000-200- 1	ROADAY DESIGN GROUP- GENERIC PAY ITEM1 (LARGE BLUE WIDGET - EA)	ZZ
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Generic items must NOT be used for non-Utilities work to:

- Specify a size on pay items for which a range of sizes is available:

0430-173-101	PIPE CULVERT OPTIONAL MATERIAL, ROUND-SHAPE, 0-24", GUTTER DRAIN	LF
↓ 		
0000-200- 1	ROADAY DESIGN GROUP- GENERIC PAY ITEM1 (PIPE CULVERT OPT MATERIAL, ROUND, 18", GUTTER DRAIN)	LF

## UTILITIES PAY ITEMS:

Generic pay items can potentially provide greater flexibility for Utilities projects. They can be used to:

- Specify a pipe size when the standard pay item is for a size range:

1050- 11-424	UTILITY PIPE, F&I, DI/CI, WATER/SEWER, 8-19.9"	LF
↓		
0000-700- 1	UTILITY DESIGN GROUP - GENERIC PAY ITEM 1 (UTILITY PIPE, F&I, DI/CI, WATER/SEWER, 10" - LF)	ZZ

- Break out fittings on items that normally have fittings included as an incidental cost of the pipe (pipe size less than 8”):

1050- 11-423	UTILITY PIPE, F&I, DI/CI, WATER/SEWER, 5-7.9"	LF
↓		
0000-700- 1	UTILITY DESIGN GROUP - GENERIC PAY ITEM 1 (UTILITY PIPE, F&I, DI/CI, WATER/SEWER, 6" - LF)	ZZ
0000-700- 2	UTILITY DESIGN GROUP - GENERIC PAY ITEM 2 (UTILITY FITTINGS, F&I, DI/CI, ELBOW, 6" - EA)	ZZ
0000-700- 3	UTILITY DESIGN GROUP - GENERIC PAY ITEM 3 (UTILITY FITTINGS, F&I, DI/CI, TEE, 6" - EA)	ZZ
0000-700- 4	UTILITY DESIGN GROUP - GENERIC PAY ITEM 4 (UTILITY FITTINGS, F&I, DI/CI, CAP/PLUG, 6" - EA)	ZZ

- Combine fittings into one pay item when the standard pay item does not include the fittings (pipe size greater than or equal to 8”).

1055- 11-414	UTILITY FITTINGS, F&I, DI/CI, ELBOW, 8-19.9"	EA
1055- 11-424	UTILITY FITTINGS, F&I, DI/CI, TEE, 8-19.9"	EA
1055- 11-454	UTILITY FITTINGS, F&I, DI/CI, CAP/PLUG, 8-19.9"	EA
↓		
0000-700- 1	UTILITY DESIGN GROUP - GENERIC PAY ITEM 1 (UTILITY FITTINGS, 8-19.9" - EA)	ZZ

## TRAINING:

Computer-based training on generic pay items is available through the Specifications and Estimates Office website:

<http://www.dot.state.fl.us/specificationsoffice/Estimates/Training/Default.shtm>