

## ***Instructions for Project Summary of Materials Sample Form***

### ***Purpose***

Construction project managers, engineers, and inspectors have a responsibility to ensure that the quality of the installed or finished product meets the contract specifications. This should include inspection of the component materials at the time of placement or installation, as well as the workmanship and quality of the finished product. (23 CFR 637.207). Payment to the contractor for any specific pay item should not be made in full until the Construction engineer and/or inspector has done reasonable checks to ensure that the materials and the quality of the workmanship conform to the specifications.

The purpose of the Project Summary of Materials Form is to have a consolidated location to check/document that all materials incidental to any given pay item number have been reviewed and found acceptable prior to the pay item being paid. The form should initially be developed with a list of the pay items and a description of all the incidental material items/submittals that are required prior to the construction work even beginning. The list should then be updated every month prior to the district making payment to the contractor. In that respect, this form is intended for use during construction by construction personnel, not as a form mandated by the Materials Testing and Research Branch.

The Materials Testing and Research Branch requires that a Project Summary of Materials be submitted with a request for letter of material certification at the end of the project in order to verify that the districts did due diligence in inspecting the quality of the materials and workmanship on their projects. Because this documentation is primarily for the construction engineers and/or inspectors, the format can be adjusted by the individual field offices to meet their needs, as long as the guidelines outlined below are followed.

### ***Required Columns***

These are columns that would be required to appropriately document all projects. Other optional columns may help construction personnel to better document the project, but it depends on the type of project and personnel preference.

#### ***1. Item Number***

Before a project even begins, you should go through and list all the item numbers that require material sampling, testing, or documentation and list them. The list should always be grouped by item number in order to ensure that all incidental items for an item number are covered prior to payment of the item.

#### ***2. Material Sample/Description***

Each item number will probably have multiple incidental sub-items that need to be addressed individually. For example, an item for underground conduit may need submittals and/or samples for the conduit, the concrete jacket, the backfill (such as CLSM), the asphalt base, and the asphalt pavement. The list of all the incidental items/submittals required would show in this column.

**3. Sample Card #**

Also known as Job Control # or JC#. Show all the sample cards applicable to a specific item. Note that you can choose to use multiple rows (one for each sample cards) or just group the sample cards together for a particular sub-item. Also note that a particular sample card number may apply to more than one item, and therefore would show up in multiple locations on this project summary schedule.

**4. Comments**

The comments column would contain additional information about the sub-item. For example, it may have notes about others who reviewed/approved documentation, whether there were any unusual circumstances, notes on quantities, etc. Depending on the field office preference, this column may be broken up into multiple columns, or just be contained in one column.

**Optional Columns**

These are suggested columns that may make record-keeping easier for construction field offices and/or HWY-L review. Whether or not to use them is up to the discretion of the individual field offices.

**5. Accepted?**

Indicate whether item is accepted, rejected, accepted with conditions, etc. If this column is not included, need to indicate rejected (and solution) in comments column

**6. Date Sampled**

Date item sampled/paved

**7. Date JC Sent**

Date Sample card sent to Materials Testing and Research Branch.

**8. Section**

Materials Testing and Research Branch section responsible for reviewing/approving sample card.

**9. Date Notified**

Date Results from Materials Testing and Research Branch or District lab received at field office

**10. Quantity Represented**

The quantity a particular sample represents (if you have one row per sample) or the total quantity represented by the item/ sub-item.

***11.Samples Required***

Indicate the number of samples required for the item/sub-item

***12.Verification***

Mark an X in the appropriate column depending if item was accepted via documentation (such as a Certificate of Compliance), Laboratory Test (a sample), or Field Verification.