

Contractor estimate annotation checklist

Read the promise before you compare the total. Use this record with the original proposal; do not replace or rewrite the contractor's document.

PROJECT / PROPERTY NICKNAME	CONTRACTOR / PROPOSAL DATE
QUOTED TOTAL / VERSION	REVIEWED BY / DATE

Use the same nine checks on every proposal. Mark only what the writing proves. Put assumptions and verbal answers in the clarification log until the contractor returns them in a revised proposal or written addendum.

STATUS KEY

CLEAR	PARTIAL	MISSING / CONFLICTING
The proposal states an operational answer.	A category or amount exists, but important detail is unresolved.	The proposal is silent, vague, or inconsistent.

Nine-line proposal review

Write the page or section where each answer appears. If it is not written, mark it missing and ask for a revised proposal.

CHECK	STATUS + PROPOSAL PAGE	WHAT NEEDS CLARIFICATION
1. Scope: rooms, quantities, products, preparation, installation, cleanup, completion standard	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
2. Exclusions: omitted work, concealed conditions, structural work, owner-supplied items	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
3. Allowances: basis, tax, delivery, labor, markup, overage and credit rules	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
4. Permits: responsible municipality, application, fees, inspections, corrections, approvals	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
5. Payments: amount, trigger, evidence, inspection dependency, exceptions, approval	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
6. Changes: original scope, changed scope, costs and credits, markup base, time, payment	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
7. Warranty: coverage, exclusions, start date, notice, response, product documents	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
8. Schedule: prerequisites, milestones, selections, lead times, delay notice, revisions	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____
9. Closeout: punch list, final approvals, warranties, manuals, waivers, photos, keys	☐ Clear ☐ Partial ☐ Missing Page: _____	_____ _____ _____

Written clarification log

Send one organized request. Record the answer only after it is returned in a revised proposal or written addendum.

# / QUESTION	SENT / ANSWER DUE	WRITTEN ANSWER + DOCUMENT VERSION	TOTAL / TIME EFFECT
1. _____ _____	Sent: _____ Due: _____	_____ _____ _____	\$ _____ Days: _____
2. _____ _____	Sent: _____ Due: _____	_____ _____ _____	\$ _____ Days: _____
3. _____ _____	Sent: _____ Due: _____	_____ _____ _____	\$ _____ Days: _____
4. _____ _____	Sent: _____ Due: _____	_____ _____ _____	\$ _____ Days: _____
5. _____ _____	Sent: _____ Due: _____	_____ _____ _____	\$ _____ Days: _____
6. _____ _____	Sent: _____ Due: _____	_____ _____ _____	\$ _____ Days: _____

Clarification request starter

Before I compare this proposal with other written estimates, please clarify the marked scope, exclusions, allowances, permits, payment, change-order, warranty, schedule, and closeout items. Please include the answers in a revised proposal or written addendum and identify any effect on the total or schedule.

Revised-proposal decision record

Compare the latest complete documents, not scattered texts or an earlier total.

ORIGINAL PROPOSAL	REVISED PROPOSAL
Version/date: _____ Quoted total: \$ _____ Unresolved checks: _____	Version/date: _____ Revised total: \$ _____ Unresolved checks: _____
KNOWN PRICE CHANGE	SCHEDULE CHANGE
\$ _____ Reason: _____	Days / milestone: _____ Reason: _____

Decision before comparison

☐ Complete enough to compare	☐ Needs another revision	☐ Withdrawn / not proceeding
Reason: _____ _____	Next question: _____ _____	Recorded by/date: _____ _____

BOUNDARY

This educational checklist does not verify a contractor, license, insurance policy, proposal, price, permit requirement, inspection result, warranty, or contract. It is not legal, financial, engineering, architectural, code, or municipal advice. Requirements and rights depend on the responsible authority and the signed documents.