

UNDERSTANDING HUD CONSTRUCTION FORMS

51000-Schedule of Amounts for Contract Payments

The form above is your Schedule of Values and must be pre-approved by the Architect & Owner before submitting for a periodic payment. It is self-explanatory. Break down the units for the smallest unit of measure you will want to be paid for. For instance, if your plumber only says rough-in, stack-out, and trim-out- all per unit, then even if he has half-way completed the rough-in in four units he will get nothing because he will only be paid for the **completed** measure of unit. Instead of saying rough-in, he may want to break the rough-in into smaller sections so that if he only partially completes the rough-in he can bill for that smaller parts that are enumerated. Having more detail makes it easier for the Architect and Owner to justify partial payments.

51001-Periodic Estimate for Partial Payment

This form is used monthly to show the Work Completed to Date. Each line item will correspond to the same line item on the approved form 51000 (your Schedule of Values). The Summary page pulls numbers from all of these forms and previous payments.

51002-Schedule of Change Orders

This form is used when there are approved Change Orders. Each Change Order is listed line by line and multiple forms may be used if there are too many to list on one. In that case, type CONTINUED in the totals line and carry the balance to the next form. Start each additional page with a balance forward line.

51003-Schedule of Materials Stored

This form is used by each subcontractor and General for their respective materials. Each line item on the form should correspond with a line from the 51000. These totals are carried each month against use. Deduct use monthly and carry amount over to the 51004 Summary form. Remember- Contracting Officers are NOT required to pay for Stored Materials. ANY stored materials. The General Conditions of the HUD Contract simply allow them to **CONSIDER** paying them. As a general rule though, the normal items you would be paid for on a non-DMHA job will be paid for by DMHA. Millwork, long lead items, custom products, etc. HUD specifically forbids DMHA to pay for miscellaneous items normally used by tradesmen as a normal part of their work. For instance, tape, wire nuts, 16 p nails, etc. The general rule of thumb is that if you can pick it up at Lowes, let Lowes store it and buy it as you need it.

51004-Summary of Materials Stored

Just as it states - Summary. Each line item on this form corresponds to a 51003 Form. Total them up and then deduct the 10%. DMHA is only allowed to pay 90% of the invoice price to reimburse the Contractor for items properly stored AND PAID FOR ALREADY. You must supply invoices with the 51003 above. Also, the items are to be stored ON SITE in a locked and secured area. The Contractor's burden of risk on the material continues.

5372- Construction Progress Schedule

This form is also submitted for prior approval and then again monthly. It shows the anticipated construction completion schedule as a percentage monthly. The monthly percentages should add up to completion and are accumulated month to month. For instance, a ten month job could show 10% each month by going 10-20-30-40-etc--- until 100% after approval, the form is submitted monthly and the actual data is added to the form so that it shows the previously anticipated progress along with the actual progress. DMHA can get a finding against them if these numbers are out of whack. So if they get that way, expect to have inspectors auditing your forms.

All of the aforementioned documents may be downloaded at:

<http://www.hud.gov/offices/adm/hudclips/forms/hud5.cfm>