



QUICK REFERENCE GUIDE:

Pay Estimates – Review and Approve (Contractor & Manager Approvals)

Background:

To approve a Payment Estimate a contract must have a Payment Estimate with a Status of Pending Approval. The system will automatically assign the appropriate Approval Levels for your payment estimate depending on the Payment Estimate Type. The contractor's payment estimate approval information should be entered by project staff using the Construction Contractor Approvals role. Until a Pay Estimate is fully approved it is not possible for another Pay Estimate to be generated.

Roles:

Construction Project Manager, Construction Contractor Approvals, Construction QA Engineer, Construction Engineer

Navigation:

Payment Estimate Approval Decision

1. Use the search bar and filters to find the contract's payment estimate you need to approve.
2. Right click the **Number** and select **Open link in new tab** to open the Payment Estimate in another browser tab.
3. (optional) If you need to view a PDF of the Payment Estimate for Contractor report:
 - a. On the Contract Payment Estimate Summary, click the **Component Actions Menu** in the upper right corner.
 - b. In the Reports section, select the **Payment Estimate for Contractor** report.

- c. On Generate Report, click the **Execute** button in the upper right corner.
 - d. Ensure the Contract ID, Number, Amount, Type and Period End Date for the Payment Estimate match the printed version of the Payment Estimate.
 4. To review the Payment Estimate Exceptions, click the **Exceptions** tab.
 - a. All payment estimate exceptions will be listed in this tab (there be none). Remarks for why an exception was Overridden instead of corrected can be viewed by clicking the arrow to expand the row.
 5. To approve the Payment Estimate
 - a. On the Contract Payment Estimate Summary, click the **Component Actions Menu** in the upper right corner. In the Tasks section, click **Approve**. The system will record your Name and the Date of your approval.
 6. After Estimate approval
 - a. When you are the final Approval for the pay estimate (usually the Construction Project Manager) select the **Accounting** tab on the left hand side of the screen and click **Show first 10**.
 - b. Enter the **Transfer to Accounting Date** (when you are sending the Pay Estimate to finance) and click **Save**.

Next Steps:

Don't forget to run and attach the *Payment Estimate Finance Report* when sending the recap to the manager and/or to Finance.

If you need further assistance please contact your Module Admin
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