

## Payment Estimates - Reviewing and Approving

**BACKGROUND:** In order to approve a Payment Estimate a contract must be Active and 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. 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, you can select from either of the following options:
  - a. Click back to the browser tab for **Dashboard**. Choose Approve from the **Approval Decision** dropdown and enter **Comments** (optional). The system will record your Name and the Date of your approval.
  - b. 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.

**BACKGROUND:** For project engineers approving payment estimates they submitted for approval, the review steps are not needed. This section describes how to skip review and directly approve a payment estimate.

**ROLES:** Construction Project Engineer

**NAVIGATION:**

Construction > Contract Progress > Contract > Payment Estimates tab

6. Use the search bar and filters to find the contract's payment estimate you need to approve.
7. Click the Number and open the Payment Estimate.
8. On the Contract Payment Estimate Summary, click the **Component Actions Menu** in the upper right corner.
9. In the Tasks section, click **Approve**. The system will record your Name and the Date of your approval.