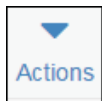


# Managing Payment Estimate Approval Decisions

**Role:** Office Staff V3, District Supervisor, HQ Finance Staff, Region M&T Supervisor, Final Records, Regional Director, Director of Construction

## Key to Actions Menus:



Global **Actions** menu  
(At the top of the screen)



Component **Actions** menu  
(On the heading)



Row **Actions** menu  
(On the row)

## Background:

- The application enables users to change the status of a payment estimate to *Pending Approval*, *Approved*, *Rejected*, or back to *Draft*. The status' *Pending Approval* and back to *Draft* are in the Price Adjustment App.
- To change the status of a payment estimate, you must be using the Office Staff V3 role.
- When you change the status of a payment estimate to a status other than *Draft*, the payment estimate can no longer be modified.
- **Note for all approves (except Office Staff V3):** If you want to approve or reject a payment estimate and enter comments for the status change, use the Payment Estimate Approval Decision Overview instead.

## Submitting for Approval:

Office staff can submit for approval through the Price Adjustment App then the payment estimate will progress through the established levels for approval. When you submit a payment estimate for approval, the system changes the status to *Pending Approval*.

The **Submit for Approval** action is only available for payment estimates with a status of *Draft* or *Rejected*, and only if you are using Office Staff V3.

The system will not update the status to *Pending Approval* if the payment estimate includes exceptions that must be resolved, acknowledged, or overridden, based on settings for the payment estimate exception type on either the contract or the underlying reference data.

**Navigation:** **Construction** > [Construction Administration](#) > Contract link

1. Click the component **Actions** menu and select the **TDOT Price Adjustment App**.
2. Click the **Execute** button.
3. Click the **Estimate Number**.
4. Click the **Setup** tab next to the blue **Export** button. Ensure all **Mix Design Asphalt Percentages** and **Liquid Anti-Strip Prices** are entered.
5. Click the **Fuel** tab next to the **Summary** tab. Review for error messages (red diamonds) and accuracy.
6. Click the **Bitm** tab next to the **Fuel** tab. Review for error messages (red diamonds) and accuracy.
7. Click the **307 A/C** tab next to the **Bitm** tab. Review for error messages (red diamonds) and accuracy.
8. Click the **411 A/C** tab next to the **307 A/C** tab. Review for error messages (red diamonds) and accuracy.
9. Click the **Liquid Anti-Strip** tab next to the **411 A/C** tab. Review for error messages (red diamonds) and accuracy.
10. Click the **Save Adjustments** button.

## Approving a Payment Estimate:

The **Approve** command is available only if the payment estimate status:

- Is in one of the approval levels, and
- Only if your active user role is given access rights.

When you approve a payment estimate, the status of the decision record is changed to *Approved*, and the status of the next sequential decision record for the payment estimate is changed to *Pending Approval*.

When the payment estimate status is changed to *Approved*, and the payment estimate cannot be modified.

**Navigation:** **Construction** > [Contract Progress](#) > (Select contract) Contract Progress > Payment Estimates tab > Estimate Number link > Contract Payment Estimate Summary

1. In the Contract Payment Estimate Summary, click the component **Actions** menu and select the **Approve** action.

- **Note:** A quick list of estimates awaiting your review can be found on the Home Dashboard at **Construction** > **Payment Estimate Approval Decisions**.

### **Rejecting a Payment Estimate:**

When you reject a payment estimate, the payment estimate is moved to the *Rejected* status. A rejected payment estimate can only be modified Office Staff V3 selects the **Return to Draft** button to return the payment estimate to draft status in the Price Adjustment App The **Reject** command is available only if the payment estimate status is in one of the approval levels for the payment estimate type and only if your active user role is assigned the correct services in access rights.

**Navigation:** **Construction** > [Contract Progress](#) > (Select contract) Contract Progress Summary > Payment Estimates tab > Number link > Contract Payment Estimate Summary

1. In the Contract Payment Estimate Summary, click the component **Actions** menu and select the **Reject** action.

- **Note:** A quick list of estimates awaiting your review can be found on the Home Dashboard at **Construction** > **Payment Estimate Approval Decisions**.

### **Tracking Payment Estimate Approval Decisions:**

The user can view the list of decision records for each approval level needed for the payment estimate on the **Approval Tracking** tab. The information is for review and cannot be edited.

**Navigation:** **Construction** > [Contract Progress](#) > (Select contract) Contract Progress Summary > Payment Estimates tab > Number link > Approval Tracking tab

1. Click the **Approval Tracking** tab.
2. View the summary information for each Approval Level on the payment estimate.

### **Changing a Payment Estimate to Draft status:**

Office Staff can change the status of a payment estimate from *Rejected* or *Pending Approval* to *Draft*. The **Change to Draft** command is available only if the payment estimate status is *Pending Approval* and your active user role

is Office Staff, or if the payment estimate status is *Rejected* and your active user role has been assigned Change Estimate to Draft access rights.

**Navigation:** **Construction** > [Construction Administration](#) > Contract link

1. Click the component **Actions** menu and select the **TDOT Price Adjustment App**.
2. Click the **Execute** button.
3. Click the **Estimate Number**.
4. Click the **Return to Draft** button.

### **Next Steps:**

After managing payment estimate approval decisions, the next step is to Manage Change Orders. Refer to TDOT Quick Reference Guides and CBTs for more information.