How to...
Approve / Reject Pay Notes
There are 2 ways to access the pay note for editing purposes. The 1st way is to select the edit icon for the corresponding pay item.

Select the “edit icon” to approve individual pay notes.

The orange circle indicates if a pay note is in the following statuses:
- Draft
-Pending Review
-Rejected
There are 2 ways to access the pay note for editing purposes. The 2nd way is to select the “Pay Notes” tab.
To quickly find pay notes, use filters as appropriate.

Select the “Apply Search” button.
Pay Note Status:
- Draft – Pay note has not been submitted to PE (can still be deleted)
- Pending Review – Pay note has been submitted to PE, but not reviewed / approved by PE
- Approved – Pay note has been approved by PE
- Rejected – Pay note has been rejected by PE
- Finalized – Pay note has been added for payment (can only access by selecting the “Pay Notes” tab)

Select the "edit icon" to edit the pay note, submit pay note to PE, or to approve / reject the pay note.
Pay Notes must be reviewed and approved by FHWA. All pay notes must be approved in order to process the estimate for payment.

Reviews and approves the pay notes based on the following:
- Dates worked
- Location / Description of work
- Correct Quantities
- Calculations
- All attached documents
Pay note continued:

Verify the following:
- Account Quantities
- Production rates
- FHWA inspector
- Contractor Inspector
- Interim/Final
- Check supporting documentation

If any changes are made, press Save.
The PE has several options for a pay note that is pending review:

- Accept the pay note
- Accept the pay note with notes
- Reject the pay note
All notes should be added under “Reference.” Notes will include:

- If any changes were made in calculations and quantities
- Reason for rejecting paynote
- If the PE added any additional information or pictures
- Why a pay note is marked for “Information Only”
Pay notes marked as “For Information Only” will not be included in the production rate calculations. Total Production Days may need to be edited to reflect the smaller quantity.

You can also mark entire pay note “For Information Only”. If marked for “For information Only” the pay note will not be included for payment. (Will be labeled as I/O on Pay Note Summary.) After being marked, the pay note must be approved.

If the pay note is marked “For Information Only,” put an explanation in “Reference.”

Pay notes marked as “For Information Only” will not be included in the production rate calculations. Total Production Days may need to be edited to reflect the smaller quantity.
Pay note continued:

Once a pay note has been submitted to the PE (status “pending review”), it can NOT be deleted. If the pay note is in error, the PE must:

- Reject the pay note for it to be corrected / resubmitted
- PE must approve it and mark it “for information only”

Approve the pay note: This adds the pay note quantity to the pay note summary for payment processing.

Reject the pay note: This returns the pay note back to the contractor for correction.
Even if the pay note is in \"Approved\" status, the PE can reject it.

Select the \"edit icon\" to go back to the pay note and reject it.
The green circle indicates that all pay notes for this pay item have been approved by the PE.

Select the “edit icon” to go back and reject a pay note.
In the Grand Summary, icons will show the current status of the pay note.

<table>
<thead>
<tr>
<th>Pay Item #</th>
<th>Amount</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>25501-0000</td>
<td>7,243.00</td>
<td>Orange (1/3 full) = Draft or Submitted to PE</td>
</tr>
<tr>
<td>30102-0100</td>
<td>689.00</td>
<td>Green (2/3 full) = Approved</td>
</tr>
<tr>
<td>30102-0100</td>
<td>0.00</td>
<td>Blue (3/3 full) = Added to payment</td>
</tr>
<tr>
<td>30105-0000</td>
<td>5,500.00</td>
<td>Orange (1/3 full) = Draft or Submitted to PE</td>
</tr>
</tbody>
</table>

General order of operations:

- **Contractor** will complete a pay note and “Submit to PE”
  - Orange icon will appear Orange, and 1/3 filled when “Submitted to PE”
- **PE** will review the submitted pay sheet and “Approve” or “Reject”
  - Green icon will appear Green, and 2/3 filled when pay note is “Approved”
  - Orange icon will appear Orange, and 1/3 filled when pay note is “Rejected”
- **PE** will review all “Approved” pay notes, adjust retain, and probables as the final step of the pay period, but before the next pay period is created and select “Add to Payment”
  - Blue icon will appear blue, and completely filled when “Added to Payment”