How to...
Create A New Pay Period
Each Progress Payment status can be found under the “Progress Payment” tab. The possible statuses of a payment are:

- **Current** – The progress payment is active for the PE and the contractor. Only 2 progress payments can be in “Current” status at one time. **Only having 1 progress payment in “Current” status is recommended.**
- **Submitted** – The PE has approved all pay notes, posted them for payment and the progress payment has been “Sent to Main office.”
- **Approved** – The progress payment has been approved by the PE.
- **Paid** – Progress payment has been sent to Finance for payment.
Each progress payment is assigned a payment type depending on the project completion. The progress payment types are:

- Initial
- Progress
- Semi-final
- Final

Final Progress Payments are only for the Final Review Engineer to do. The PE will only have a semi-final estimate.
Only the Project Engineer and the Assistant Project Engineer can add a new progress payment.

Select the “Add New” button to create a new Progress Payment.
The “Add New” button will automatically take you to the new grand summary of the new progress estimate.
Select the “Close” button to go back to the list of progress payments.
Pay Period Number 4 has been added to the “Progress Payment” list.

Select the edit icon to access the “Grand Summary” and edit the progress estimate “Period” information.
Select the “Period” tab to edit the progress payment period information.
Periods are automatically set to 1 month. Periods cannot overlap, and there can be no gaps between periods.

Select the “Start Date.”

Only the Project Engineer and Assistant Project Engineer can change this tab.
Select the “Payment Type.” (Only Progress or Semi-Final will be used by PE.)

Only the Project Engineer and Assistant Project Engineer can change this tab.
Select the “End Date”

Only the Project Engineer and Assistant Project Engineer can change this tab.
Select the “Save” button.
You can delete the Progress Payment Period if you have no pay notes for this period. Select “Delete” to do so.