

Creating Applications

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1. Regular Billing Cycles

- Bill on a consistent schedule (e.g., monthly).
- Do not skip application numbers.
- Maintain sequential numbering.

2. Accurate Current Period Values

- Be conservative when estimating work completed.
- Document your basis for percentage complete calculations.
- Consider site visits or photos to support your billing.

3. Stored Materials

- Only bill for materials properly stored on-site or off-site.
- Ensure stored materials are protected and insured.
- Follow contract requirements for stored materials billing.

4. Review Before Finalizing

- Double-check all calculated values.
 - Verify retainage calculations.
 - Review the Application and Certification for Payment form total against your expectations.
 - Preview the printed forms before finalizing.
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