Roveya™

PRACTICAL GUIDE · 11

Roveya Applications for Payment Workflow Guide

Build the application. Check the evidence. Track the outcome.

A practical workflow for preparing, checking and following an application for payment.

01	02	03	04	05
Set basis	Compile	Review	Submit	Resolve

SET BASIS · COMPILE · REVIEW · SUBMIT · RESOLVE

01

Confirm what can be applied for

Begin with the contract, order or agreed instruction. Confirm the valuation period, rates, quantities, milestones and submission requirements before assembling the application.

Commercial basis

- [ ] Correct client, contract, project and site are identified
- [ ] Application number and valuation period are confirmed
- [ ] Agreed rates, quantities, milestones or pricing basis are available
- [ ] Previously submitted and certified amounts are known
- [ ] Variations and additional work have an identifiable instruction or approval route
- [ ] Submission deadline, recipient, format and required portal are confirmed
- [ ] Tax and other commercial treatment follow the contract and finance process

Application record

CLIENT	CONTRACT/ORDER REFERENCE	PROJECT/SITE
APPLICATION NUMBER	PERIOD FROM/TO	SUBMISSION DUE DATE
PREPARED BY		

02

Connect each amount to the work

Write the application so that someone who was not on site when the work was done can follow it. Each amount should show what was done, the basis it is priced on and where the supporting record can be found.

Line items

WORK ITEM OR VARIATION	BASIS/RATE	QUANTITY OR PROGRESS	AMOUNT CLAIMED	EVIDENCE REFERENCE	NOTES

Evidence to consider

Where required by the contract or client

- Work orders and agreed instructions
- Completed works and progress records
- Approved variation records
- Relevant photographs and client correspondence
- Attendance or timesheet records
- Inspection, service or completion records
- Delivery or equipment records

Reference supporting records consistently. Where evidence is incomplete or an amount is disputed, flag it for review rather than presenting it as agreed.

03

Check the figures and the story

Commercial check

- [ ] Rates, quantities and calculations match the agreed basis
- [ ] Previous applications and amounts already paid are accounted for
- [ ] Variations are clearly separated and referenced
- [ ] Adjustments, deductions and credits are explained
- [ ] The total agrees with the supporting schedule

Operational check

- [ ] Claimed work matches the relevant period and site
- [ ] Supporting records are present and legible
- [ ] Exceptions and incomplete work are visible
- [ ] The correct internal reviewer has checked the application
- [ ] The submission pack follows the client's stated requirements

Review sign-off

PREPARED BY

REVIEWED BY

REVIEW DATE

ISSUES TO RESOLVE

FINAL APPROVED SUBMISSION AMOUNT

04

Keep the outcome traceable

1. Submit through the method required by the client or contract.
2. Retain the submitted version, supporting pack, date and acknowledgement.
3. Log queries against the relevant line item and provide a referenced response.
4. Record any assessed or certified amount and the reason for a difference.
5. Reconcile the eventual invoice and payment through the organisation's finance process.

Status tracker

APPLICATION NUMBER	SUBMITTED ON	SUBMITTED TO/METHOD	AMOUNT APPLIED FOR	CURRENT STATUS	NEXT ACTION/OWNER

Query and difference log

LINE ITEM	QUERY OR DIFFERENCE	RESPONSE/EVIDENCE	OWNER	DATE RESOLVED	OUTCOME

Where Roveya fits

Roveya Admin supports back-office coordination of work, records and commercial review. Roveya Ops supports field recording of work and evidence. Roveya Hub supports management oversight on the move. Together, these records can inform an application for payment, subject to the organisation's configured workflow and the contract requirements.

Roveya™

A clear application is easier to review and resolve.

When the commercial basis, work completed, evidence and decisions are connected, teams can explain the amount applied for and respond to queries with confidence.

Continue exploring

01 Roveya Platform Overview

02 Roveya Admin Overview

03 Roveya Ops Overview

08 Compliance Evidence Guide

07 Field Operations Checklist

Roveya website

See how Roveya fits your operation

roveya.io

Book a demo