Project Manager Invoice Review
ProjectWise Process

Folder:

CSD Consultant Payments
  Consultants - A G H I J K L M N O
    ABCD Company - example for training
      2013-1234-Z000
      In Box
      Rejected

Workflow:

CSD Invoice

- Pending
- Notify PM
- Processed by PM
- Initiate Admin Approval
- Submitted to ASD for Processing
- Payment Processed
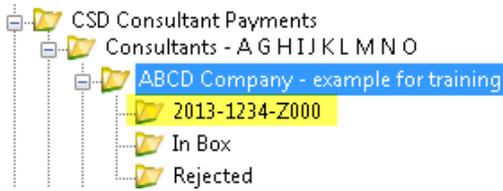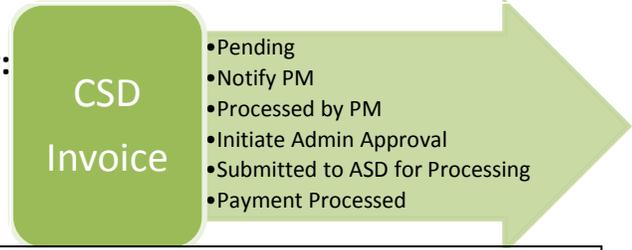
State:	CSD Invoice – Notify PM
Step	**Action**
1	*CSD Payment Tech* – Send *'Notification of Invoice For Approval'* email to Project Manager

2	*MDOT Project Manager* - Upon receipt of email from CSD Payment Tech, please review consultant invoice.
	• Log into ProjectWise
	  NOTE: Problems logging in? Email MDOT-ProjectWise@Michigan.gov for user account information.
	• Navigate to CSD Consultant Payments (Documents > CSD Consultant Payments folder).
	• Copy the link in the email into the Address bar in ProjectWise
	• Double click on Invoice to open the file in Adobe
	• Review Invoice
	• If notes/comments are needed, please use the Adobe Typewrite tool to do so.
	   ○ In Adobe, select Tools (side bar)
	   ○ Then Content
	   ○ Select 🖨 Add or Edit Text Box
	   ○ Then select the location on the document where comments need to be placed
	   NOTE: Please do NOT cover any fields and/or verbiage on the Invoice
	• Also, please respond to any Payment Tech's comments using the Typewrite tool
	• *If the invoice is approved, proceed to the next step*
	• *If the invoice needs to be rejected, proceed to Step 6*

	If the invoice is ***ready for approval***:
Step	**Action**

3	*Apply Approval Stamp or Electronic Signature:*
	• Option 1 - Apply 'Approve' Stamp
	   ○ In Adobe, select Comment (side bar), then Annotations
	   ○ Click on the Stamp Icon
	   ○ Select Dynamic
	   ○ Next, select the 'Approve 👤 ▾ mp that shows name, date and time. **APPROVED** *By Gregory Vanis at 7:00 am, Oct 26, 2015*
	  Or -
	• Option 2 – Apply Electronic Signature
	   ○ In Adobe, select Tools (side bar), then Sign & Certify
	   ○ Select 'Sign Document' option
	   ○ Apply your digitally encrypted electronic signature

4	*After applying Approval Stamp or Electronic Signature:* • Save the file and Exit Adobe • Click Check In • Highlight Invoice • Then right click and select Change State • Select Next • Click on OK in the 'Change Document to State' window *NOTE: If this is the final invoice for this project, please complete an evaluation.*
5	*MDOT Project Manager –* Add the CSD Payment Tech's name into the system generated email. *NOTE: Leave existing addresses in email.* CSD Invoice - Processed by PM - Message (Plain Text) FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW DEVELOPER From ▼ VerhageH@michigan.gov To... ☐ MDOT-CSD-Consultant-Payments <MDOT-CSD-Consultant-Payments@michigan.gov>; ☐ MDOT-ProjectWiseConsultant <MDOT-ProjectWiseConsultant@Michigan.gov> Send Cc... Subject CSD Invoice - Processed by PM Please send this email to the Payment Tech (see list below) who processes invoices for the specific consultant. Pam Plementosh (PlementoshP@michigan.gov) - all Consultants starting with: B, P, Q, R, S & T Jill Foreback (ForebackJ@michigan.gov) - all Consultants starting with: A, G, H, I, J, K, L, M, N & O Janice Harris (HarrisJ1@michigan.gov) - all Consultants starting with:C, D, E, F, U, V, W, X, Y & Z

State:	CSD Invoice – Processed by PM *NOTE: CSD will continue to process the Invoice.*

	If it is ***needs to be rejected:***
Step	Action

6	*NOTE: Please <u>do not</u> apply Approval stamp or Electronic Signature*
	
	If invoice needs to be rejected, please do the following:
	
	• Contact the Consultant and let them know that the Invoice is being rejected and why. This includes if a cost is not valid.
	• Place note on Invoice's Voucher Summary Form listing reason(s) for rejection by using the Adobe Typewrite tool
	    ○ In Adobe, select Tools (side bar)
	    ○ Then Content
	    ○ Select 🖨 Add or Edit Text Box
	    ○ Then select the location on the document where comments need to be placed
	
	NOTE: Please do NOT cover any fields and/or verbiage on the Invoice. Also, if comment is too long, please add comment to email back to CSD Payment Tech.

7	*After applying comments:* • Save the file and Exit Adobe • Click Check In • Highlight Invoice • Then right click and select Change State • Select Previous • Click on OK in the 'Change Document to State' window
8	*Reply to the Payment Tech's email stating that the invoice has been rejected.* *NOTE: Do not forgot to add comments to either the Invoice's Voucher Summary page or place comments in this email.*

State:	CSD Invoice – Pending

Need Assistance?

Email MDOT-ProjectWise@Michigan.gov with any ProjectWise related questions.

Direct Consultants to email MDOT-ProjectWiseConsultant@Michigan.gov for any ProjectWise related questions.

Email HillC7@Michigan.gov with any CSD Invoice Process Related Questions