

Balance Lump Sum Items

Lump sum items in an Appia® project must be balanced before initiating the final payment. They won't be included if a change order is created when issuing the final payment. If you have any lump sum items on daily reports that have not yet been included in an approved payment, please pay those items before starting this process.

You will need to complete the balance process only for items that are flagged as a lump sum in the reference item list.

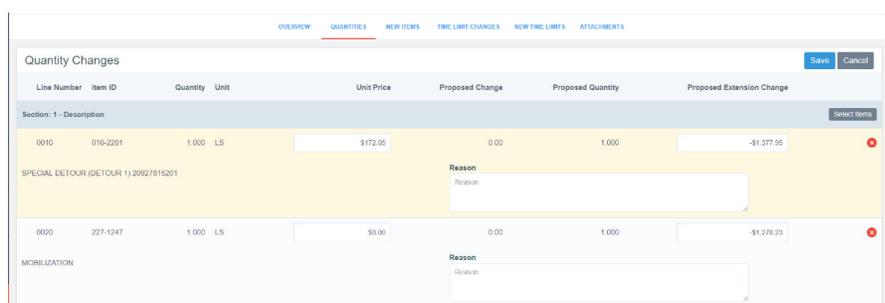
Before You Begin

Verify the items are marked as lump sum in the item reference list. Items can have a unit of Lump Sum without actually being flagged as a lump sum item.

- Open the project item list. If the item has no unit price, then it is a lump sum item.
- If you have system management access, you can look at the item details in the reference item list. The Lump Sum? field will be answered Yes if the item is a lump sum.
- Review your item history for all unbalanced lump sum items. Make note of the amount placed and the authorized amount for each item.

Balance Lump Sum Items

1. With your project open, click **Change Order** in the Sidebar menu.
2. Click **Add**, or edit an existing change order.
3. Enter any change order information and click **Save**.
4. Click **Edit** for quantity changes.
5. Click **Select Items** and select any lump sum items that still has a quantity remaining. A quantity remains if the total in the Placed column is anything other than 1 and the total in the Remaining column is anything other than zero.
6. You can also add any other items that need a quantity change.



Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change
0010	016-2201	1,000	LS	\$172.05	0.00	1,000	-\$1,377.95
SPECIAL DETOUR (DETOUR 1) 20927815201				Reason: <input type="text"/>			
0000	227-1247	1,000	LS	\$0.00	0.00	1,000	-\$1,278.23
MICROBILIZATION				Reason: <input type="text"/>			

7. Click **Add Items**.
8. If your lump sum item has not been placed within the project, enter **0** into the Unit Price field.
9. If your lump sum item has been placed, change the Unit Price or the Proposed Extension Change field.
 - If you are changing the unit price, enter the amount placed in the Unit Price. The Proposed Extension Change field will display the difference from the authorized amount.
 - If you are changing the proposed extension, subtract the authorized amount from the amount placed. You will end up with a negative number. Enter the number in the Proposed Extension Change field. The Unit Price field will change to show the amount paid.
10. Enter any values for other items, and enter any reasons as necessary.
11. Click **Save**, then click **Submit for Approval**.

Once the change order is approved, you must create a daily report for these items. Make sure the daily report date is on or after the approval date of the change order.

Add Items to Daily Report

Once the change order is approved, you need to add the lump sum items to a daily report. The daily report must be created on or after the date the change order was approved.

1. With the daily report open, select the **Item Postings** tab or click **Edit** in the Item Postings header on the daily report page to open the Item Postings page.
2. Click **Add**. The Appia service displays the item list for the project.
3. Select the item to add to the daily report. Use the search feature if necessary. Click **Add Items**. The Appia service places the items into the daily report.
4. If an item displays the Use Worksheet link, click the link and enter the required information used at the location by one contractor into the fields. Click **Use Worksheet** to add the result to the daily report.
5. For items not using worksheet calculations, enter the quantity used at the location by one contractor into the Quantity Placed field. The Remaining Quantity field for lump sum items should equal zero.

Repeat the steps for each item. When you are finished, click **Save**.

The daily report must be approved before initiating the final payment.