



Billing Adjustment for Change in Federal Participation Rate Overview

In Cardinal, a billing adjustment be created when the participation rate on a **Rate Set** is changed on the Federal Agreement to adjust the life to date billings accordingly. You will be required to manually calculate the difference between the amount that has been billed to FHWA and what should have been billed (by **Contract Line, Project, Activity** and **Appropriation Code**). This difference is the amount of the billing adjustment.

The billing adjustment will update the project transaction table and reflect in the processed amount when all required fields are populated. If all fields are not populated, the data will not flow to the project transaction table and you will have to create a second billing adjustment to correct the data.

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PA_Billing Adjustment for Change in Federal Participation Rate**Identify if a Billing Adjustment is Needed**

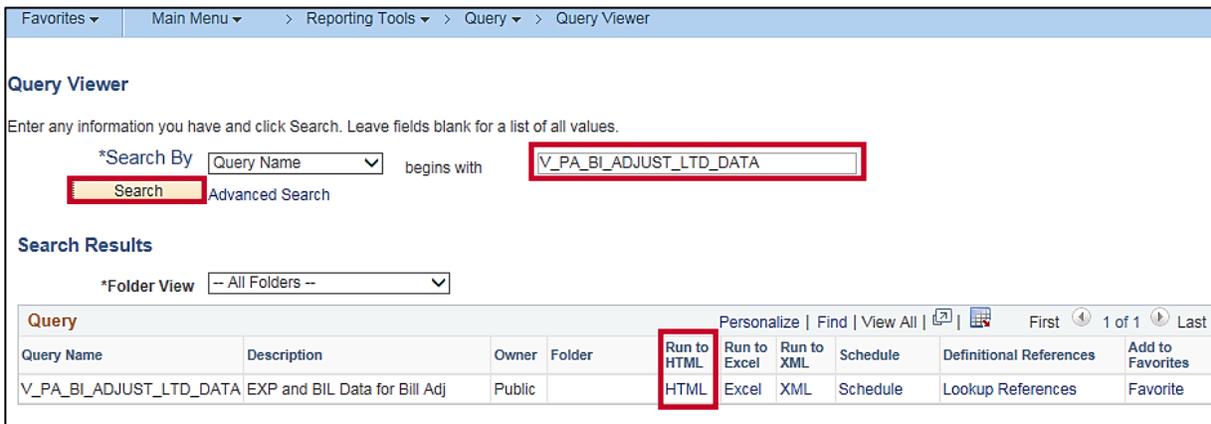
When entering a contract amendment, a billing adjustment is needed if the participation rate changes. If the former amount and the revised amount of the **Percent Federal Share** line on the amended Federal Agreement differ, a billing adjustment needs to be processed prior to amending the contract in Cardinal. The contract should be placed on **Hold** until the manual billing adjustment has been completed.

Determine the Amount Previously Billed

Determine the amount of life to date expenditures that have been billed for this contract line by **Contract/Contract Line/Project/Activity/Transaction Identifier** by using the **EXP and BIL Data for Bill Adj** query.

1. To access the query, navigate to the **Query Viewer** using the following path:

Main Menu > Reporting Tools > Query > Query Viewer



The screenshot shows the 'Query Viewer' interface. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Reporting Tools > Query > Query Viewer'. Below this, the 'Query Viewer' title is displayed. A search prompt says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are: '*Search By' (Query Name) begins with 'V_PA_BI_ADJUST_LTD_DATA'. A red box highlights the 'Search' button. Below the search results, there is a 'Folder View' dropdown set to '-- All Folders --'. A table of search results is shown with columns: Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Run to XML, Schedule, Definitional References, and Add to Favorites. The first row contains: 'V_PA_BI_ADJUST_LTD_DATA', 'EXP and BIL Data for Bill Adj', 'Public', and a red box highlights the 'Run to HTML' link.

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |
|-------------------------|-------------------------------|--------|--------|-------------|--------------|------------|----------|-------------------------|------------------|
| V_PA_BI_ADJUST_LTD_DATA | EXP and BIL Data for Bill Adj | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |

2. Enter the Query Name in the begins with field: V_PA_BI_ADJUST_LTD_DATA
3. Click the **Search** button.
4. Click the **Run to HTML** hyperlink.



PA_Billing Adjustment for Change in Federal Participation Rate

V_PA_BI_ADJUST_LTD_DATA - EXP and BIL Data for Bill Adj

Contract Number x
Business Unit
[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (159 kb)

View All First 1-100 of 503 Last

| | Contract Number | Contract Line Number | Project ID | Activity ID | Fund Code | Program | Source Type | Rate Set | Amount Type | Amount |
|---|-----------------|----------------------|--------------|-------------|-----------|---------|-------------|-------------|------------------------|------------|
| 1 | 000S218 | | 1 0000081738 | 605 | 04720 | 603002 | | N/A | BILLED EXPENDITURE AMT | -438203.55 |
| 2 | 000S218 | | 1 0000081738 | 605 | 04720 | 603002 | L01E | FED_L01E_90 | BILLED AMT | -278312.46 |
| 3 | 000S218 | | 1 0000081738 | 605 | 04720 | 603002 | L050 | FED_L050_80 | BILLED AMT | 420.62 |
| 4 | 000S218 | | 1 0000081738 | 605 | 04720 | 603002 | L05E | FED_L05E_80 | BILLED AMT | -103594.61 |
| 5 | 000S218 | | 1 0000081738 | 606 | 04720 | 603002 | | N/A | BILLED EXPENDITURE AMT | 3902.84 |
| 6 | 000S218 | | 1 0000081738 | 606 | 04720 | 603002 | L050 | FED_L050_80 | BILLED AMT | 0.02 |
| 7 | 000S218 | | 1 0000081738 | 606 | 04720 | 603002 | L05E | FED_L05E_80 | BILLED AMT | 3122.27 |

5. **Contract Number:** Enter the **Contract Number** (e.g., **00S218**) for the contract you wish to adjust.
6. **Business Unit:** 50100 for VDOT
7. Click the **View Results** button. The life to date billing expenditures displays below the query parameters. The results may be downloaded to excel by clicking on the **Excel Spreadsheet** hyperlink.



PA_Billing Adjustment for Change in Federal Participation Rate

Calculate the Billing Adjustment

1. For each **Contract, Contract Line Number, Project, Activity, and Source Type** compute the net difference between the actual expenditures billed and the amount that should have been billed based on the new participation rate for your contract and **Source Type**:
 - a. Calculate the actual total billed using the life to date expenditures (a) from the query and the original participation rate (b) in the original Federal Agreement [actual billing = total life to date expenditures (a) * original participation rate (b)].
 - b. Calculate the revised total billing amount (i.e., the amount that should have been billed based on the new participation rate) using the life to date expenditures (a) from the query and the new participation rate (c) from the amended Federal Agreement [revised total billing = total life to date expenditures (a) * new participation rate (b)].
2. Determine if the difference between the actual total billed and the revised total billing represents an amount to bill or a credit to the account:
 - a. Subtract the actual total billed amount from the new total billed [actual total billed (c) – revised total billed (e) = Credit/(Bill)].
 - i. Amount billed > revised total billing = credit
 - ii. Amount billed < revised total billing = bill

| Contract # 000S218; Source Type L220 | | | | | | | | |
|--------------------------------------|------------|----------|--|------------------------------------|---------------------------------------|-------------------------------|---|--------------------------------------|
| Contract Line # | Project | Activity | (a) Total Life to Date Expenditures | (b) Original Participation Rate | (c) Actual Total Billed (a * b) | (d) New Participation Rate | (e) Revised Total Billing (c * d) | *Difference Credit/(Bill) (c – e) |
| 1 | 0000081738 | 605 | \$820,531 | 80% | \$656,425 | 90% | \$738,478 | \$(82,053.12) |
| 1 | 0000081738 | 606 | 7,025.13 | 80% | 5,620.10 | 90% | 6,323 | (702.51) |
| 1 | 0000081738 | 611 | 580.36 | 80% | 464.29 | 90% | 522 | (58.04) |



Project Accounting Job Aid

PA_Billing Adjustment for Change in Federal Participation Rate

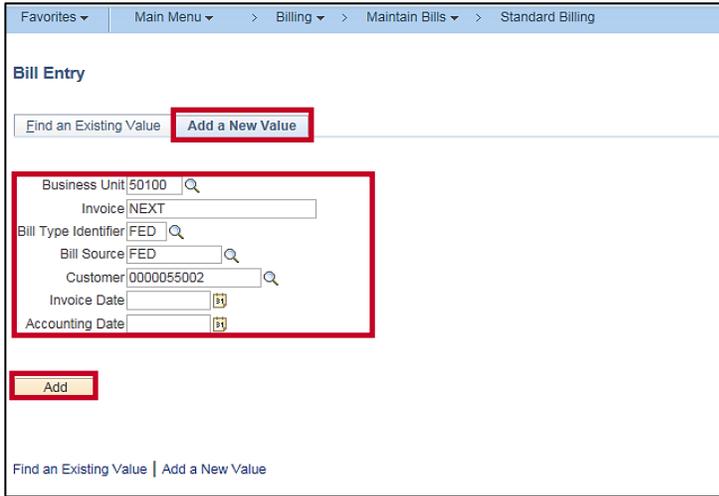
* Each unique combination of **Contract**, **Contract Line Number**, **Project**, **Activity**, and **Source Type** will be its own line on the **Billing Adjustment**. In this example three billing lines will be created.

PA_Billing Adjustment for Change in Federal Participation Rate

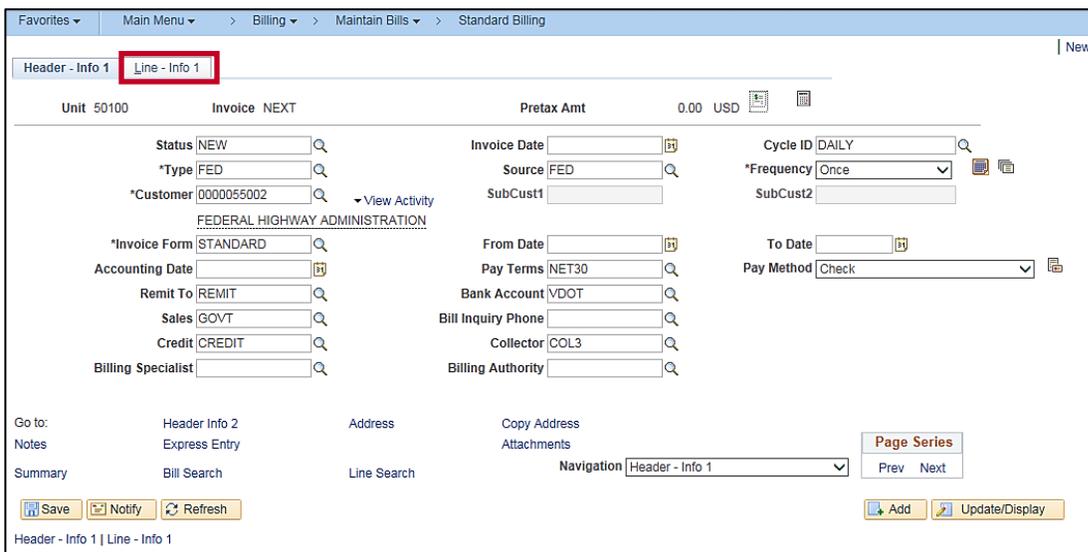
Create an Online Bill for the Billing Adjustment

1. To access the **Bill Entry** page, navigate using the following path:

Main Menu > Billing > Maintain Bills > Standard Billing

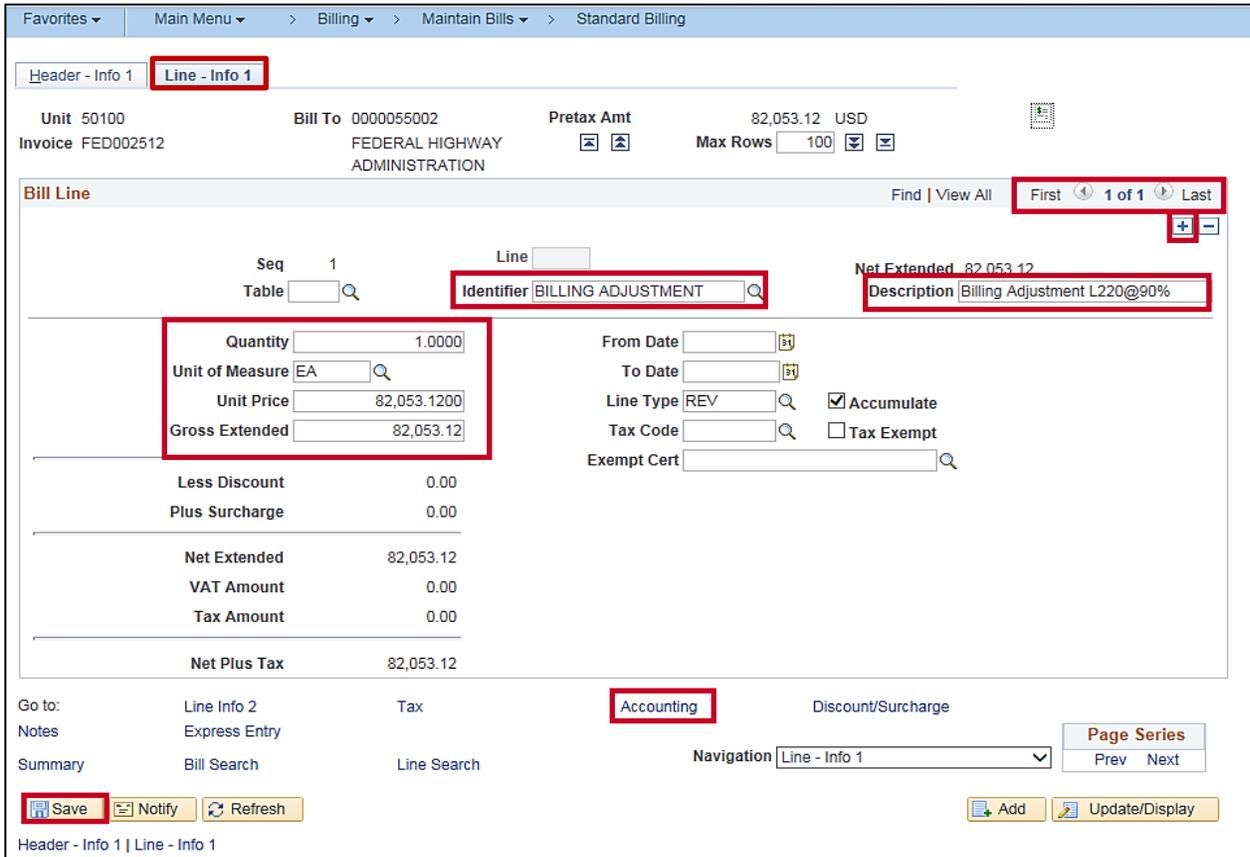


2. Click the **Add a New Value** tab.
3. In the **Bill Type Identifier** enter: FED
4. In the **Bill Source** enter: **FED**
5. In the **Customer Number** enter: 0000055002
6. Click the **Add** button.



PA_Billing Adjustment for Change in Federal Participation Rate

- The **Standard Billing** page, **Header – Info 1** tab displays. Data defaults based on the **Bill Source**, **Bill Type Identifier**, and **Customer** number entered.
- Click the **Line - Info 1** tab.



Favorites > Main Menu > Billing > Maintain Bills > Standard Billing

Header - Info 1 | **Line - Info 1**

Unit 50100 Bill To 0000055002 Pretax Amt 82,053.12 USD
 Invoice FED002512 FEDERAL HIGHWAY ADMINISTRATION Max Rows 100

Bill Line Find | View All First 1 of 1 Last

| Seq | Line | Table | Identifier | Description | Net Extended |
|-----|------|-------|--------------------|-----------------------------|--------------|
| 1 | | | BILLING ADJUSTMENT | Billing Adjustment L220@90% | 82,053.12 |

Quantity: 1.0000 Unit of Measure: EA Unit Price: 82,053.1200 Gross Extended: 82,053.12

From Date: To Date: Line Type: REV Accumulate Tax Exempt

| | |
|---------------------|------------------|
| Less Discount | 0.00 |
| Plus Surcharge | 0.00 |
| Net Extended | 82,053.12 |
| VAT Amount | 0.00 |
| Tax Amount | 0.00 |
| Net Plus Tax | 82,053.12 |

Go to: Line Info 2 Tax Accounting Discount/Surcharge
 Notes Express Entry
 Summary Bill Search Line Search Navigation: Line - Info 1

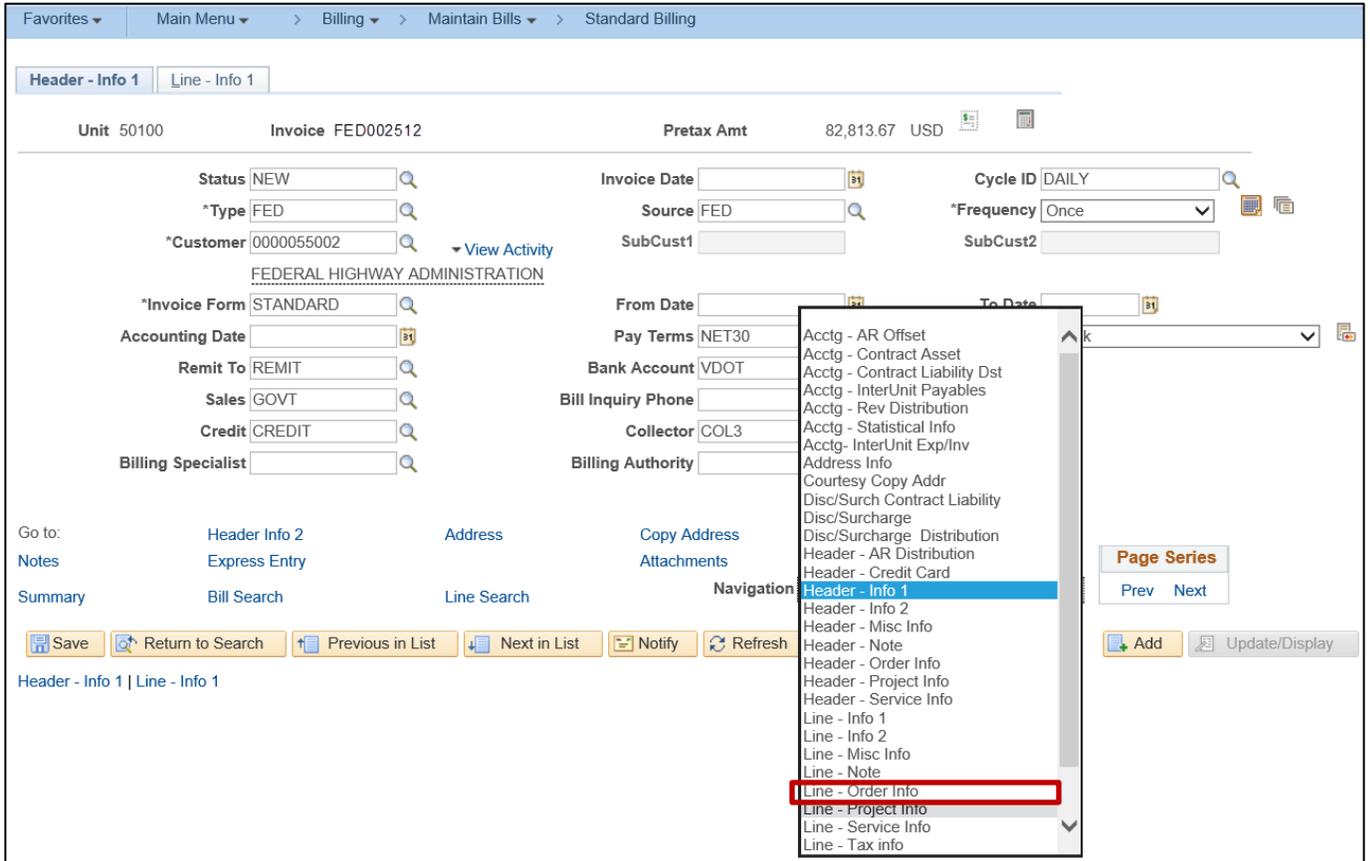
Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1

- The Standard Billing page, Line – Info 1 tab displays.
- Identifier:** Enter **Billing Adjustment** (This is a free form field; there are no look up values to choose from.)
- Description:** Enter **Billing Adjustment** followed by the **Source Type**, the @ symbol and the new participation rate (e.g., **Billing Adjustment L220@90%**).
- Enter the **Quantity: 1**
- Enter the Unit of Measure: EA
- Enter the **Unit Price** (line adjustment amount to be billed).
- Click the **Save** button. An **Invoice** number is assigned. The **Gross Extended** amount is populated. The **Pretax Amt** is also updated and reflects the total of all bill lines entered and saved.

PA_Billing Adjustment for Change in Federal Participation Rate

- Click the (+) button to enter an additional line (if necessary). Add adjustment billing line(s) for each unique combination of **Contract, Contract Line Number, Project, Activity, and Source Type** as calculated above.
- Repeat the steps above until all **Bill Lines** are entered. In this example two additional **Bill Lines** will need to be entered, for a total of three **Bill Lines**.



Unit 50100 Invoice FED002512 Pretax Amt 82,813.67 USD

Status NEW Invoice Date Cycle ID DAILY

*Type FED Source FED *Frequency Once

*Customer 0000055002 SubCust1 SubCust2

FEDERAL HIGHWAY ADMINISTRATION

*Invoice Form STANDARD From Date To Date

Accounting Date Pay Terms NET30

Remit To REMIT Bank Account VDOT

Sales GOVT Bill Inquiry Phone

Credit CREDIT Collector COL3

Billing Specialist Billing Authority

Go to: Header Info 2 Address Copy Address

Notes Express Entry Attachments

Summary Bill Search Line Search Navigation

Save Return to Search Previous in List Next in List Notify Refresh

Header - Info 1 | Line - Info 1

Navigation menu options:

- Acctg - AR Offset
- Acctg - Contract Asset
- Acctg - Contract Liability Dst
- Acctg - InterUnit Payables
- Acctg - Rev Distribution
- Acctg - Statistical Info
- Acctg - InterUnit Exp/Inv
- Address Info
- Courtesy Copy Addr
- Disc/Surch Contract Liability
- Disc/Surcharge
- Disc/Surcharge Distribution
- Header - AR Distribution
- Header - Credit Card
- Header - Info 1
- Header - Info 2
- Header - Misc Info
- Header - Note
- Header - Order Info
- Header - Project Info
- Header - Service Info
- Line - Info 1
- Line - Info 2
- Line - Misc Info
- Line - Note
- Line - Order Info
- Line - Project Info
- Line - Service Info
- Line - Tax info

- After all **Bill Lines** have been entered, click the **Navigation** drop-down and select **Line-Project Info** option.



Project Accounting Job Aid

PA_Billing Adjustment for Change in Federal Participation Rate

Unit 50100 Bill To 0000055002 Pretax Amt 82,813.67 USD
Invoice FED002512 FEDERAL HIGHWAY ADMINISTRATION Max Rows 100

Seq 1 Line Net Extended 82,053.12
Table Identifier BILLING ADJUSTMENT Description Billing Adjustment L220@90%

Start Date End Date Activity Type ID PPDAddSeq Occurrence System Source

Transaction ID Billing Plan ID B101 BP Line Contracts Business Unit 50100 Contract 000S218 Progress Payment Seq

Project Chartfields
Project Info
PC Bus Unit 50100
Project 0000081738
Activity 605
Source Type L220
Category
Subcategory
Analysis Type BAJ

Go to: Line Info 2 Tax Accounting Discount/Surcharge
Notes Express Entry Page Series
Summary Bill Search Line Search Navigation Line - Project Info Prev Next

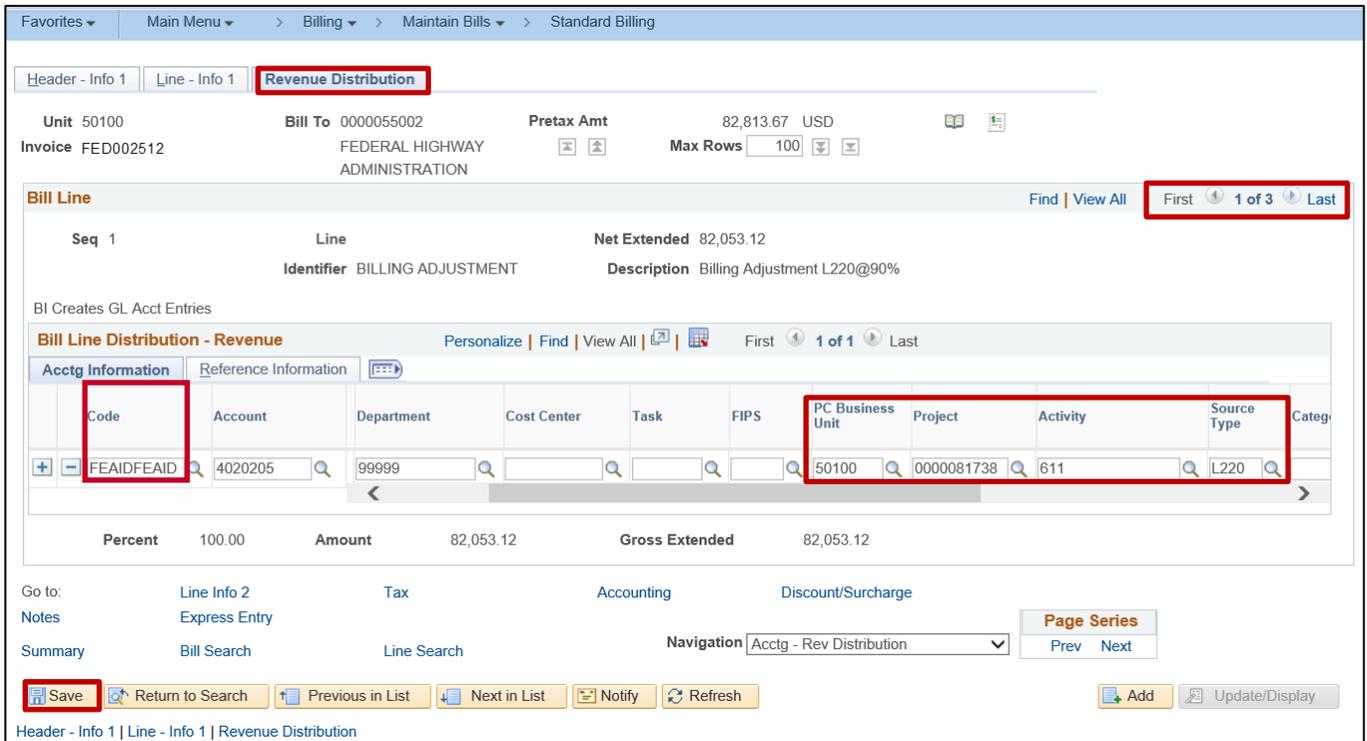
Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1 | Line - Proj Info

19. The **Line - Proj Info** tab displays.
20. In the **Bill Line** section, for each **Bill Line**:
 - a. Enter the Contract fields:
 - i. Billing Plan ID
 - ii. Contracts Business Unit: 50100
 - iii. Contract
 - b. Enter the Project ChartFields:
 - i. PC Bus Unit: 50100
 - ii. Project
 - iii. Activity
 - iv. Source Type
 - v. Analysis Type: BAJ

PA_Billing Adjustment for Change in Federal Participation Rate

21. Click the **Save** button.
22. From the **Bill Line** section use the navigation arrows to scroll through each **Bill Line** and repeat the **Line – Proj Info** steps for each **Bill Line**.
23. Click the **Accounting** link at the bottom of the page.



The screenshot shows the 'Revenue Distribution' tab in a software application. The interface includes a breadcrumb trail: 'Billing > Maintain Bills > Standard Billing'. Below this, there are tabs for 'Header - Info 1', 'Line - Info 1', and 'Revenue Distribution' (which is selected and highlighted with a red box). The main area displays 'Unit 50100', 'Invoice FED002512', 'Bill To 0000055002', 'FEDERAL HIGHWAY ADMINISTRATION', 'Pretax Amt 82,813.67 USD', and 'Max Rows 100'. A 'Bill Line' section shows 'Seq 1', 'Line', 'Net Extended 82,053.12', 'Identifier BILLING ADJUSTMENT', and 'Description Billing Adjustment L220@90%'. Below this is a 'Bill Line Distribution - Revenue' section with a table. The table has columns: Code, Account, Department, Cost Center, Task, FIPS, PC Business Unit, Project, Activity, Source Type, and Category. The 'Code' field is highlighted with a red box and contains 'FEAIDFEAID'. The 'PC Business Unit', 'Project', 'Activity', and 'Source Type' fields are also highlighted with a red box and contain '50100', '0000081738', '611', and 'L220' respectively. At the bottom of the interface, there are navigation buttons: 'Save' (highlighted with a red box), 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Add', and 'Update/Display'. The footer of the interface reads 'Header - Info 1 | Line - Info 1 | Revenue Distribution'.

24. The Revenue Distribution tab displays.
25. In the **Bill Line Distribution – Revenue** section, enter the **Federal Distribution Code (FEAIDFEAID)** in the **Code** field for adjustments using regular appropriation codes.
26. Verify that the **PC Business Unit**, **Project**, **Activity**, and **Source Type** values are correct. These values should match values entered on the **Line-Project Info** page.
27. Using the navigational arrows in the **Bill Line** section header, scroll through each **Bill Line** and update the **Bill Line Distribution – Revenue** section as noted in the steps above. Be sure to add the appropriate **Project** number for each **Bill Line** you update.
28. Click the **Save** button.



Project Accounting Job Aid

PA_Billing Adjustment for Change in Federal Participation Rate

Favorites ▾ Main Menu ▾ > Billing ▾ > Maintain Bills ▾ > Standard Billing

Header - Info 1 | Line - Info 1 | Revenue Distribution

Unit 50100 Bill To 0000055002 Pretax Amt 82,813.67 USD
Invoice FED002512 FEDERAL HIGHWAY ADMINISTRATION Max Rows 100

Bill Line Find | View All First 1 of 3 Last

Seq 1 Line Net Extended 82,053.12
Identifier BILLING ADJUSTMENT Description Billing Adjustment L220@90%

BI Creates GL Acct Entries

Bill Line Distribution - Revenue Personalize | Find | View All | First 1 of 1 Last

| Code | Account | Department | Cost Center | Task | FIPS | PC Business Unit | Project | Activity | Source Type | Category |
|------|---------|------------|-------------|------|------|------------------|------------|----------|-------------|----------|
| | 4020205 | 99999 | | | | 50100 | 0000081738 | 611 | L220 | |

Percent 100.00 Amount 82,053.12 Gross Extended 82,053.12

Go to: Line Info 2 Tax Accounting Discount/Surcharge
Notes Express Entry
Summary Bill Search Line Search Navigation Acctg - Rev Distribution Page Series Prev Next

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1 | Revenue Distribution

29. When you click **Save**, the **Code** field(s) become blank.

30. Click the arrow to enter and save the information for the additional lines.



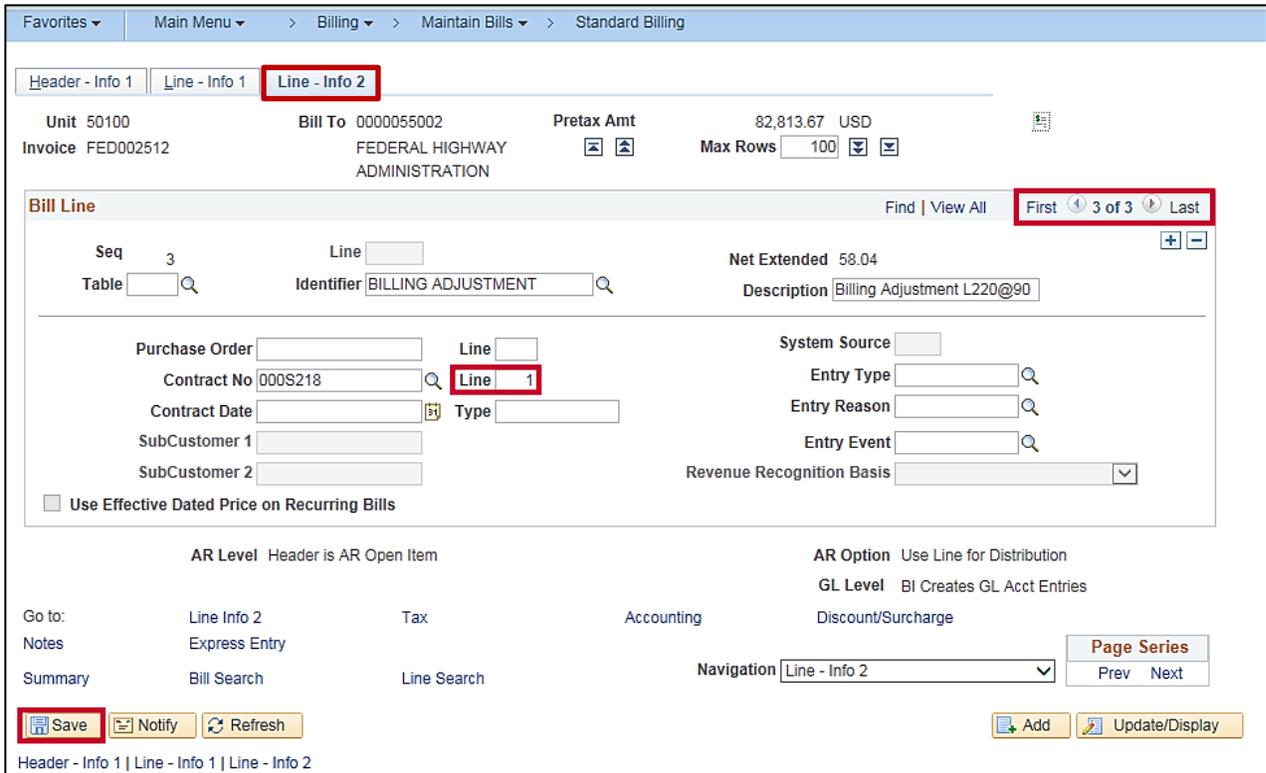
Project Accounting Job Aid

PA_Billing Adjustment for Change in Federal Participation Rate

The screenshot shows a software interface for a Billing Adjustment. The top navigation bar includes 'Favorites', 'Main Menu', 'Billing', 'Maintain Bills', and 'Standard Billing'. The main header area displays 'Unit 50100', 'Bill To 0000055002', 'Pretax Amt 82,813.67 USD', and 'Invoice FED002512'. The 'Bill Line' section shows 'Seq 1', 'Line Identifier BILLING ADJUSTMENT', and 'Description Billing Adjustment L220@90%'. A 'Bill Line Distribution - Revenue' table is visible, with columns for 'Code', 'Account', 'Department', 'Cost Center', 'Task', and 'FI'. The table shows a distribution of 100.00% for account 4020205, department 99999, and a gross extended amount of 82,053.12. A 'Navigation' dropdown menu is open, listing various options such as 'Acctg - AR Offset', 'Acctg - Contract Asset', and 'Line - Info 2'. The 'Line - Info 2' option is highlighted with a red box. Other interface elements include 'Page Series' (Prev, Next) and 'Add' buttons.

31. From the **Navigation** drop-down list, select the **Line – Info 2** option.

PA_Billing Adjustment for Change in Federal Participation Rate



Favorites > Main Menu > Billing > Maintain Bills > Standard Billing

Header - Info 1 | Line - Info 1 | **Line - Info 2**

Unit 50100 Bill To 0000055002 Pretax Amt 82,813.67 USD Max Rows 100

Invoice FED002512 FEDERAL HIGHWAY ADMINISTRATION

Bill Line Find | View All **First 3 of 3 Last**

Seq 3 Line Net Extended 58.04

Table Identifier BILLING ADJUSTMENT Description Billing Adjustment L220@90

Purchase Order Line System Source

Contract No 000S218 **Line 1** Entry Type

Contract Date Type Entry Reason

SubCustomer 1 Entry Event

SubCustomer 2 Revenue Recognition Basis

Use Effective Dated Price on Recurring Bills

AR Level Header is AR Open Item AR Option Use Line for Distribution

GL Level BI Creates GL Acct Entries

Go to: Line Info 2 Tax Accounting Discount/Surcharge

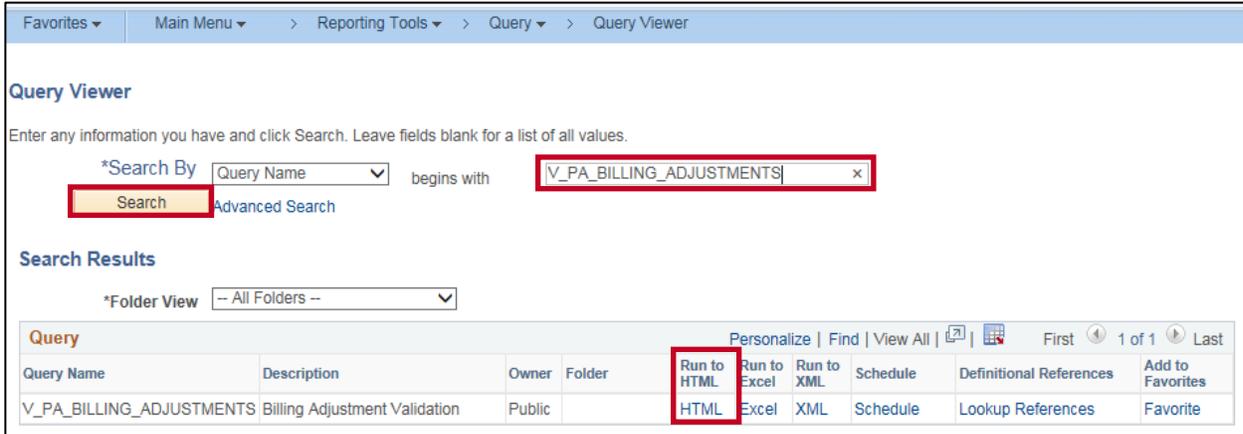
Notes Express Entry

Summary Bill Search Line Search Navigation Line - Info 2

Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1 | Line - Info 2

32. The **Line – Info 2** tab displays.
33. Enter the contract line number in the **Line** field box next to the **Contract No.** field. In most cases the contract line number will be **1**, however, verify this in case the line number is different on the actual contract.
34. From the **Bill Line** section use the navigation arrows to scroll through each bill line and repeat the **Line – Info 1** step for each bill line.
35. Click the **Save** button.

Verify Data Input

The screenshot shows the 'Query Viewer' interface. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Reporting Tools > Query > Query Viewer'. Below this, the 'Query Viewer' title is followed by instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are set to '*Search By' with a dropdown menu showing 'Query Name', and 'begins with' followed by a text input field containing 'V_PA_BILLING_ADJUSTMENTS'. A 'Search' button is highlighted with a red box. Below the search area, there is a 'Search Results' section with a '*Folder View' dropdown set to '-- All Folders --'. A table of search results is displayed, with the 'Run to HTML' link for the first result highlighted with a red box.

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |
|--------------------------|-------------------------------|--------|--------|-------------|--------------|------------|----------|-------------------------|------------------|
| V_PA_BILLING_ADJUSTMENTS | Billing Adjustment Validation | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |

1. Verify all fields have been populated on the **Billing Adjustment** by using the **Billing Adjustment Validation** query. To access the query, navigate using the following path:

Main Menu > Reporting Tools > Query > Query Viewer

2. Enter Query Name: V_PA_BILLING_ADJUSTMENTS
3. Click the **Search** button.
4. Click the **HTML** hyperlink.

PA_Billing Adjustment for Change in Federal Participation Rate

V_PA_BILLING_ADJUSTMENTS - Billing Adjustment Validation

User ID (% for all)

Invoice Status

Business Unit

Invoice (% for all)

Contract Type (% for all)

Bill Source (% for all)

Accounting Date From

Accounting Date To

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (15 kb)

View All First 1-22 of 22 Last

| Business Unit | Invoice | Description | Invoice Line | Net Extended Amount | Contract Business Unit | Contract # | Contract Type | Billing Plan ID | Contract Date | Accounting Date | Contract Line Num | PC Business Unit | Project | Activity | Source Type | Category | Subcategory | Revenue Sequence Number | PC Distribution Status | Account | Department | Asset Task | Fund Code | FIPS | Cost Center | Program | Project | User ID |
|---------------|---------|-------------------------|--------------|---------------------|------------------------|------------|---------------|-----------------|---------------|-----------------|-------------------|------------------|------------|----------|-------------|----------|-------------|-------------------------|------------------------|---------|------------|------------|-----------|------|-------------|------------|---------------|---------|
| 1 | 50100 | Billing Adjustment-L22E | 1 | 1,280 | 50100 | 5A01305 | F | B101 | 07/19/2012 | 07/19/2012 | 1 | 50100 | 0000018634 | 64660 | L22E | | | 1 | D | 4020205 | 99999 | | 04010 | | | 0000018634 | DENETTA.COLES | |
| 2 | 50100 | Billing Adjustment-H220 | 2 | 4,790 | 50100 | 5184003 | F | B101 | 07/19/2012 | 07/19/2012 | 1 | 50100 | 0000097811 | 612 | H220 | | | 1 | D | 4020205 | 99999 | | 04010 | | | 0000097811 | DENETTA.COLES | |
| 3 | 50100 | Billing Adjustment-L20E | 3 | 2,170 | 50100 | 0688013 | F | B101 | 07/19/2012 | 07/19/2012 | 1 | 50100 | 0000090958 | 626 | L20E | | | 1 | D | 4020205 | 99999 | | 04010 | | | 0000090958 | DENETTA.COLES | |

5. Enter your **User ID**.
6. Select Invoice Status: **New Bill**
7. Enter Business Unit: **50100**
8. Enter your **Invoice ID or %**.
9. Enter Contract Type: **F**
10. Enter Bill Source: **%**
11. Enter Accounting Date From: **01/01/1901**
12. Enter Accounting Date To: **Today's Date**
13. Click the **View Results** button. If data has been missed or entered incorrectly, go back to your **Invoice** and enter the appropriate data. Follow the steps identified in this job aid to update your **Invoice**.
14. To update the **Invoice** to a **Status** of **Ready to Invoice**, navigate to and select your **Invoice** from the **Standard Billing** page using the following path:

Main Menu > Billing > Standard Billing



Set Invoice to Ready (RDY)

The screenshot shows a web-based billing system interface. At the top, there are navigation menus: Favorites, Main Menu, Billing, Maintain Bills, and Standard Billing. Below the navigation, there are tabs for 'Header - Info 1' and 'Line - Info 1'. The main content area displays invoice information for Unit 50100 and Invoice FED002512, with a Pretax Amt of 82,813.67 USD. The Status field is highlighted in red and set to 'RDY'. Other fields include *Type (FED), *Customer (0000055002), Invoice Date, Source (FED), Cycle ID (DAILY), *Frequency (Once), SubCust1, SubCust2, *Invoice Form (STANDARD), Accounting Date, Remit To (REMIT), Sales (GOVT), Credit (CREDIT), Billing Specialist, From Date, Pay Terms (NET30), To Date, Pay Method (Check), Bank Account (VDOT), Bill Inquiry Phone, Collector (COL3), and Billing Authority. At the bottom, there are buttons for Save, Notify, Refresh, Add, and Update/Display. The Save button is highlighted in red.

1. Change the **Status** from **NEW** to Ready (**RDY**).
2. Click the **Save** button.
3. The contract **Bill Plan Hold** can be removed a day after the **Billing Adjustment** has been finalized (Invoice **Status** is **INV**).