

Submitting Fees

Introduction

In Fieldglass, a payment request is referred to as submitting a Fee. A Fee contains the billing details for labour, equipment, materials, etc. covering a single work day at a single site. (In other words, you cannot combine the work performed at different sites or on different days within one Fee.)

A Fee must be submitted within 72 hours of the completion of each day's work.

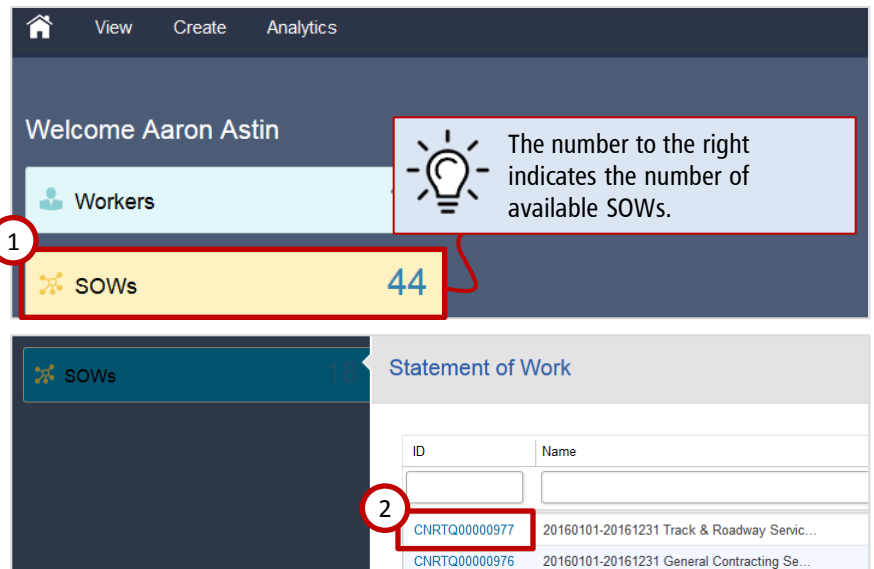
In order to successfully submit a Fee, you need to:

- I. Locate the appropriate SOW
- II. Verify that all the items you need to bill for (labour, equipment, materials, etc.) are included on the SOW
- III. Verify that the SOW Workers have been created and assigned the correct roles
- IV. Create Fee
 1. Complete Fee Details
 2. Add Fee (Fee with SOW Workers and/or Regular Fee)
 3. Enter Comments
 4. Enter Adjustments (US tax only), if applicable
 5. Add Attachments
 6. Review and Submit

I. Locate an SOW

Prior to submitting a Fee, you need to locate the appropriate SOW to charge against. To locate the SOW from the Home page, complete the following steps:

1. **SOWs:** Click the SOWs button. A list of available SOWs will be displayed in a popup.
2. **SOW ID:** Click the ID link of the SOW for which you want to submit a payment request. The SOW page will be displayed.



The screenshot shows the Fieldglass home page for user Aaron Astin. The navigation bar includes 'View', 'Create', and 'Analytics'. Below the welcome message, there are buttons for 'Workers' and 'SOWs'. The 'SOWs' button is highlighted with a red box and a circled '1'. To its right, the number '44' is displayed. A callout box with a lightbulb icon points to the number '44' and contains the text: 'The number to the right indicates the number of available SOWs.' Below the 'SOWs' button, a 'Statement of Work' popup is visible, showing a table of SOWs. The first row in the table has its ID link highlighted with a red box and a circled '2'.

ID	Name
CNRTQ0000977	20160101-20161231 Track & Roadway Servic...
CNRTQ0000976	20160101-20161231 General Contracting Se...

Submitting Fees

II. Verify SOW Items

Once you have located the appropriate SOW, check to verify that it includes all the items you need to bill for (labour, equipment, materials and other items as applicable). All billable items are listed under the Characteristics tab. The labour and equipment roles are listed under the SOW Workers tab.

To verify the SOW items, complete the following steps:

1. **Characteristics:** Click the Characteristics tab.
2. **Fee Definitions:** Click the button next to Fee Definitions to display a list of billable items.
3. **Fee Items:** Ensure all the necessary items have been listed.

Click each item to review its summary displayed in the lower window.



If you notice a missing or incorrect item, contact the SOW Owner.

Details
Characteristics
SOW Workers
Time & Expense
More ▾

Summary

Items	Final Amount (CAD)
Fees	3,229.64
Total	3,229.64

From: 2016-01-01 to 2016-12-31 Type: All Fee Definitions Fee Payments Filter

Group By: None Items Found: 6 Rows: 5

#▲	Name	Owner	Fee Rate Type	PO Number	Product	Maximum Units	Rate
2	Labour_Details	PCO user1	Defined on Lookup - Fee with SOW Workers		No	0.00	0.00/HR
3	Equip_Details	PCO user1	Defined on Lookup - Fee with SOW Workers		No	0.00	0.00/HR
4	Subcontracting	PCO user1	Defined on Fees		No	0.00	1.00/EA
5	Material per Each	PCO user1	Defined on Fees		No	0.00	21.00/EA
6	Material with Receipts	PCO user1	Defined on Fees		No	0.00	1.00/EA

◀◀ 1 of 2 ▶▶

Unit Definition

Use the arrows as needed to view the next page or return to the previous page.

Labour_Details

Statement of Work
20160101-20161231 General Contracting Services Canada [CNRTQ00000976](#) Sequence # 2 Buyer Canadian National Railway

Accounting (CAD)

Rate	0.00
Cost Allocation	N/A
Total	0.000

Unit Definition Details

Defined By	Buyer
Site	SUPPLIER TO SELECT SITE (SITE)
Auto Invoice	Yes
Maximum Units	0
Utilized Units	28
PO Number	
Description	
Contract Number	6343889
Labour Details	0
Service Type	0 (0)
Contract Line Item Amount	(No Value)

Posting Information

Owner	PCO user1
Capitalized?	No

Submitting Fees

III. Verify SOW Workers

Prior to submitting a Fee, check to verify that all the SOW Workers you need to bill for have been added and assigned the appropriate roles for labour and equipment.

To verify the SOW Workers, complete the following steps:

- SOW Workers:** Click the SOW Workers tab.
- SOW Worker List:** Ensure the SOW Workers you need to bill for have been listed and assigned the appropriate roles.



If the worker you need to bill for is not listed, add that worker to the SOW.

Refer to the **Adding Workers to an SOW** job aid to learn more.

1

Details Characteristics **SOW Workers** Time & Expense More ▾

SOW Workers Items Found: 20 Rows: 5 Filter

Revision	Status	Name	Work Order ID	Worker ID	Role	Site	Equipment	Use Fees Billing
0	Open	Compton, Bill	CNRWO00000828	CNRWK00000686	Carpenter	SUPPLIER TO No		Yes
0	Open	Compton, Bill	CNRWO00000852	CNRWK00000710	Carpenter	SUPPLIER TO No		Yes
0	Open	Lopez, Johnathan	CNRWO00000829	CNRWK00000687	Carpenter Foreman	SUPPLIER TO No		Yes
0	Open	123, Crawler	CNRWO00000851	CNRWK00000709	Crane Crawler Lattice 100 - 199	SUPPLIER TO Yes		Yes
0	Open	tracked, Dozer 1	CNRWO00000849	CNRWK00000707	Dozer Tracked 20000 - 29999	SUPPLIER TO Yes		Yes

2

Worker Name Worker Role

SOW Worker CNRWO00000828

Compton, Bill (CNRWK00000686)

Status Confirmed

SOW Worker Details Worker Role

Role	Carpenter
Site	SUPPLIER TO SELECT SITE
Use Fees for Billing	Yes

Worker Rules

SOW Workers	No
SOW Workers with Fees	Yes
Auto Activate SOW Worker	Yes
Auto Register SOW Worker	Yes
Require Approvals on SOW Workers added during SOW Response and SOW Revision Response.	No
Give Workers access to all Task Codes for the Cost Centers	Yes

Roles for SOW Workers with Fees

Boat Air (MSC0040)
Carpenter (L0018)
Carpenter Foreman (L0019)
Compressor Diesel Tow Behind UNDER 250 CFM (MSC0110)
Crane Crawler Lattice 100 - 199 TON (HEQ0260)

Submitting Fees

IV. Create Fee

Once you have verified that all the items you need to bill for are included on the SOW, and that all the SOW workers have been added with the appropriate roles, you are ready to continue with the Fee submission process.

Create Fee: Select Create Fee from the Actions list below the SOW Header. The Fee Setup page will be displayed.

The screenshot displays the 'Statement of Work' (SOW) header for '20160101-20161231 General Contracting Services Canada'. The status is 'Approved' and the buyer is 'Canadian National Railway'. An 'Actions' dropdown menu is open, highlighting the 'Create Fee' option. Below the menu, a table shows fee payments with columns for Status, ID, Submit Date, and Amount (CAD). A callout box points to the 'Create Fee' button in the table, stating: 'Alternatively, you can click the Create Fee button located under Fee Payments on the SOW Characteristics page.'

Status	ID	Submit Date	Amount (CAD)
Invoiced	CNRTU00000724	2016-04-19	1,694.08
Pending Appr	CNRTU00000771	2016-04-22	1,535.56

Submitting Fees

IV. Create Fee, cont'd

1. **Complete Fee Details:** Complete the Details section as applicable.

- a. **Effective Date:** Enter the date for the work day being billed.
- b. **Site:** Select the site corresponding to where the work was performed from the dropdown list provided.
- c. **Approver:** Select the designated CN Approver for this Fee by typing their name in the field. The list will narrow the options as you type.

If the person's name is not on the list, contact the SOW Owner.

- d. **Mile From:** Enter the mile point where the work began on the particular day.
- e. **Mile To:** Enter the mile point where the work ended on the particular day.
For work done on a bridge, or at one mile point, please enter the same mile point for both fields.

For work done in a yard or anywhere not the right of way, please enter information about the location (for example, the name of the yard).

- f. **Track ID:** Enter the Track ID.
- g. **Tax Jurisdiction:** Click Edit and enter the information as applicable.

For work performed in the US: Select the State, County, City and Zip code corresponding to where the work was performed. Click Update.

For work performed in Canada: Select Not Applicable from the State dropdown list. Click Update.

Details

Effective Date
2016-06-15 a

Auto Invoice
 Yes No

Site b
340 - CHICAGO - IL (IL340)

Approver c
Prust, Paul

Remit-to Address (optional)

Tax Jurisdiction
IL;COOK;CHICAGO;6029 g [Edit](#)

Mile From d
12

Mile To e
14

Track ID f
01

Ensure the Auto Invoice is set to Yes. This means that once this submission has been approved as required, it will automatically trigger the creation of Invoice and queue for payment.

You can search for a Site by typing in the Subdivision, Province or State to narrow the selection.

This is the CN employee that requested the work.

State
AR

County
ARKANSAS

City
ALMYRA

Zip
72003

[Cancel](#) [Update](#)

If you cannot find the exact County or City, select the next closest one in the appropriate Zip Code.

State
Not Applicable

[Cancel](#) [Update](#)

Submitting Fees

IV. Create Fee, cont'd

- h. **Crew/Gang Name:** Enter your Crew/Gang Name, if applicable.
- i. **Start Time:** Enter the earliest start time for that day.
- j. **End Time:** Enter the latest end time for that day.
- k. **Cost Object Information:** If known, enter the cost object(s) applicable for that day.
- l. **Edit Job Details:** Click Edit to specify the details of the work performed that day. You will be prompted to select the Asset Type and Service Type from the dropdown list that will appear. Depending on the Service Type Selected, you may need to select a Productivity measure. Click Update when done.
- m. **Quantity Completed:** Enter the completed quantity corresponding to the productivity measure for which you were prompted, if any.



Leave this field blank if there was no productivity measure for the Service Type selected.

- n. **Delays:** Enter any delays experienced during the day being billed for.
- o. **Travel/Transit:** Enter any travel or transit time.



Enter any additional information regarding delays and travel/transit time in the Comments section at the bottom of the Fee Setup screen.

- p. **Vendor Invoice Reference Number:** Enter your internal number (i.e., Invoice, Job, etc.), if any, to help you reconcile the payment internally.

Crew/Gang Name (optional)

Start Time ⓘ
 ⓘ

End Time ⓘ
 ⓘ

Cost Object Information (optional) ⓘ

Job Details
[Edit](#) ⓘ



The time must be entered using the format illustrated here.

Job Details

Asset Type
 [Edit](#)

Service Type
 [Edit](#)

Productivity

[Cancel](#) [Update](#)



The Productivity dropdown list will be populated based on your selection of the Asset Type and Service Type.

Job Details

0100 Track;TR00100 Ballast - Shoulder Cleaning;Feet of Shoulder Ballast cleaning [Edit](#)

Quantity Completed (optional) ⓘ
 ⓘ

Contractor Delay (optional) ⓘ
 ⓘ

Train Delay (optional) ⓘ
 ⓘ

Other CN Delay (optional) ⓘ
 ⓘ

Travel Onsite (optional) ⓘ
 ⓘ

Transit Offsite (optional) ⓘ
 ⓘ

Vendor Invoice reference number (optional)
 ⓘ

Submitting Fees

IV. Create Fee, cont'd

2. **Add Fee:** Once you have completed the Details section, you can proceed with adding a Fee with SOW Worker or a regular Fee.

Add a Fee with SOW Worker

This fee type allows you to bill for the daily work performed by people and/or equipment.

- Add Fee with SOW Worker:** Click Add Fee with SOW Worker to display the SOW Worker information popup window.
- Fee Name:** Select the appropriate rate table for the labour or equipment workers you want to bill for.
- SOW Worker - Role - End Date:** Select a specific worker or piece of equipment from the dropdown list provided. Based on the selected rate table, the window will expand with the appropriate rate information.
- Rate:** Click the rate that applies to the number of hours worked. The selected rate will be displayed under Units.
- Units:** Enter the number of work hours.

Fee with SOW Workers

a + Add Fee with SOW Worker

Fees

Add Fee with SOW Worker

Select a Fee and SOW Worker, then complete required information. If the Fee uses a lookup, you will need to select one Rate from the Rates available for the SOW Worker.

Fee Name **b**

SOW Worker - Role - End Date **c**

Cancel Add & Copy Update

Add Fee with SOW Worker

Select a Fee and SOW Worker, then complete required information. If the Fee uses a lookup, you will need to select one Rate from the Rates available for the SOW Worker.

Fee Name
3-Labour_Details

SOW Worker - Role - End Date
Compton, Bill - Carpenter - 2016-12-31

Description (optional)

Units
Hour

Select Rate
7055024

Contract Number	Labour Details	Rate Category Code	Rate
7055024	All	All	
7055024	Standard	RT_HR	92.32
7055024	Standard	OT	123.51
7055024	Standard	DT	153.51

d

Units **e** 8 Hour

Select Rate
7055024 Standard RT_HR 92.32

Contract Number	Labour Details	Rate Category Code	Rate
7055024	Standard	RT_HR	
7055024	Standard	RT_HR	92.32

Cancel Add & Copy Update

Submitting Fees

IV. Create Fee, cont'd

Once you have selected the correct rate and entered the number of hours worked, you can:

- Remain in the same window and enter time for the same worker at a different rate for that same day;
- Remain in the same window and add another worker; or
- Register your worker information and return to the Fee Setup page;

To add time for the same worker at a different rate:

- Add and Copy:** Click Add & Copy to register your current worker information. A Success message will appear at the top of the window.

Success!
Success! Fee has been added.

Repeat the steps **d - e** on the previous page to enter the number of hours worked by the same worker at a different rate.

To add another worker:

Repeat the steps **b - e** on the previous page.

To register your selection and return to the Fee Setup page:

- Update:** Click Update to register your worker information and close the window.



Clicking the X button will close the window and return you to the Setup page.



Add Fee with SOW Worker

Select a Fee and SOW Worker, then complete required information. If the Fee uses a lookup, you will need to select one Rate from the Rates available for the SOW Worker.

Fee Name
2-Labour_Details

SOW Worker - Role - End Date
Compton, Bill - Carpenter - 2016-12-31

Description (optional)

Units
8 Hour

Select Rate
6343889 Standard RT_HR 92.32

Contract Number	Labour Details	Rate Category Code	Rate
6343889	Standard	RT_HR	
6343889	Standard	RT_HR	92.32



Clicking Cancel will close the window and return you to the Setup page.

Cancel

1

2

Add & Copy

Update



Click Add & Copy to save your current entry and remain in the same window to add another entry.



Click Update to save your current entry and close the window.

Submitting Fees

IV. Create Fee, cont'd

Once you have closed the worker popup window, the information you have entered will appear as follows on the Fee Setup page. At any time, you can remove or edit your entries as shown below.

Fee with SOW Workers

Clicking this button will remove **all** fees.

Name
Labour_Details

Description (optional)

SOW Worker Compton, Bill	Contract Number 6343889	Labour Details Standard
Rate Category Code RT_HR		
Sequence # 2	Capitalized? No	PO Number (No Value)

Units

Rate
92.32

Amount (CAD)
738.56

+ Copy Fee
Edit Fee

Clicking this button will remove this specific fee.

x
x

Name
Equip_Details

Description (optional)

SOW Worker tracked, Dozer 1	Contract Number 6343889	Equipment Details D5
Rate Category Code RT_HR		
Sequence # 3	Capitalized? No	PO Number (No Value)

Units

Rate
73.51

Amount (CAD)
588.08

+ Copy Fee
Edit Fee

Click these buttons to add a new fee or edit the existing fee.

+ Add Fee with SOW Worker

Labour

Equipment

Submitting Fees

IV. Create Fee, cont'd

Add a Fee

A regular fee is a fee that does not have a labour or equipment worker associated to it. It is a fee with a defined rate or mark-up.

To submit charges for fees with defined rates or mark-ups, complete the following steps:

- Add Fee:** Click Add Fee to display the fee information fields.
- Name:** Select the appropriate fee from the dropdown list provided. The corresponding fee rate will be displayed below.
- Description:** Enter the description as applicable (optional).

Provide any required information in the fields that appear.

- Units:** Enter the total cost of materials.

All corresponding receipts must be attached to the Fee. See next page for information on how to add attachments.

Fee with SOW Workers

[+ Add Fee with SOW Worker](#)

Fees

a [+ Add Fee](#)

b Name: 6-Material with Receipt

Description: tool kit **c**

Sequence #	Capitalized?	PO Number
6	No	(No Value)

Note

Enter dollar value of receipt - in Canada EXCLUDE tax. Attach copy of invoice to this Fee.

Provider Company Name: Home Depot

Service Type : 0 (0)

Units: 117.99 **d**

Rate	Amount (CAD)
1.00	117.99

[Calculate Fee Rate Amount](#)

The list of fees is prepopulated based on the fees defined in the SOW.

The Rate reflects the markup percentage that applies, e.g., the rate of 1.00 means the fee will be covered at 100%.

Submitting Fees

IV. Create Fee, cont'd

3. **Enter Comments:** Enter any comments related to the Fee you are submitting. These comments will be visible to the CN Approver(s).

4. **Enter Adjustments:** This is for US Tax purposes only.

For work performed in the US: Select US Tax from the dropdown list. If applicable, enter the dollar amount in the Value field.

For work performed in Canada: There is nothing to enter.

5. **Add Attachments:** Click Add Attachments to include any supporting documents. The Attach Document window will be displayed.

a. **Browse:** Click Browse to select the file you need.

b. **Attach:** Click Attach to attach the file and close the popup window. The attachment information will be displayed.

c. **Description:** Enter the attachment description as applicable.



Enter comments regarding any delays and/or travel & transit time, if applicable. Clear explanation will speed up the process.

3

Comments (optional)

(characters remaining: 1000)

4

x	Level	Name	Description	Unit	Value
x	1	US Tax		Flat Fee	250
x	1				

5

No Attachments Defined

+ Add Attachments



Click Continue when you are ready to move on to the next step (Review and Submit).

Continue

Attach Document

Select file

Browse... a

Supported file extensions:
CSV, DOC, DOCM, DOCX, DOTM, DOTX, EFX, GIF, JFIF, JPE, JPEG, JPG, LWP, MPP, MSG, PDF, PNG, PPT, PPTX, RTF, TIF, TIFF, TXT, VSD, XLAM, XLS, XLSM, XLSX, XLTM, XLTX, XLXB.

The maximum upload size limit is 50 MB

Cancel b Attach

File Name	Person	Visibility
Daily Worksheet_20160101.xlsx (5.6 KB)	Training_Vendor 2016-05-06 05:58 PM	Public
Description DWS for the day worked c (Max. 250 characters, 228 characters remaining)		
HomeDepot20160502.xlsx (5.6 KB)	Training_Vendor 2016-05-06 06:01 PM	Public
Description Receipt for the tools c		



Attach the signed Daily Work Sheet for the same day, all required receipts, and a copy of your internal Invoice, if applicable.

Click Continue to review the information you have entered on the Setup page. The Review page will be displayed.

Submitting Fees

IV. Create Fee, cont'd

6. Review and Submit:

Ensure all of the details on the Review page are correct. Click Submit. The Fee will be routed to CN for approval.



Once a Fee has been submitted, its status will show as **Pending Approval**.



Approved Fees are auto-invoiced and queued for payment.



Rejected Fees must be resubmitted with the necessary corrections applied.



Refer to the **Responding to a Rejected Fee** job aid for more information.



When CN has responded to your Fee submission, you will receive a Notification.

Setup
Review and Submit

[Page Help](#)

Create Fee

Statement of Work	Period	Buyer
20160101-20161231 General Contracting Services Canada (CNRTQ00000976)	2016-01-01 to 2016-12-31	Canadian National Railway

Setup [Make Changes](#)

Details

Effective Date
2016-01-03

Auto Invoice
Yes

Site
180 - PELLETIER - QC (QC180)

Fee Approver
Project Manager, user1

Remit to Address
(No Value)

Mile From
12.00

Fee with SOW Workers

Equip_Details				
tracked, Dozer 1 CNRWK00000707	Role Dozer Tracked 20000 - 29999 LB	Contract Number 6343889	Equipment Details D5	Rate Categ RT_HR
Labour_Details				
Compton, Bill CNRWK00000710	Role Carpenter	Contract Number 6343889	Labour Details Standard	Rate Categ RT_HR

Fees

Fee Name 6-Material with Receipts	Description tool kit
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Sequence # 6	Capitalized No	PO Number (No Value)
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Owner
PCO user1

Note
Enter dollar value of receipt - in Canada EXCLUDE tax. Attach copy of invoice to this Fee.

Provider Company Name
Home Depot

Units 117.99	Rate 1.00	Amount (CAD) 117.99
Subtotal		117.99

Cancel
Complete Later
6
Submit



Make sure to review the Fee before clicking the Submit button.