

Payment Application Evidence Checklist

Before the application goes in

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Run this before the application goes in, while there is still time to attach what is missing. Every unticked line is a reason someone can give for certifying less.

The application itself

- ☐ It goes in on the date the contract requires
- ☐ The valuation date it covers is stated
- ☐ It is sent to the person the contract names, by the method it names
- ☐ You have proof it was sent and proof it arrived
- ☐ A copy is filed against the job, not just in sent mail

What it is claiming for

- ☐ Measured work is broken down to something checkable
- ☐ Every variation included is listed by its own reference
- ☐ Materials on site are identified and evidenced
- ☐ Materials off site are identified, with whatever the contract requires attached
- ☐ Retention is applied at the rate the contract actually states

The backup

- ☐ Each variation in the application has its instruction attached
- ☐ Timesheets or allocation sheets cover the period claimed
- ☐ Supplier invoices are attached where the claim depends on them
- ☐ Photographs or measurement records back the quantities
- ☐ Anything previously queried has its answer attached this time

After it goes in

- ☐ The date any payment notice is due back is written down
- ☐ The date any pay-less notice would have to arrive by is written down
- ☐ What was certified is recorded against what was applied for
- ☐ Any difference between the two has a written explanation on file
- ☐ Where there is no explanation, it has been asked for in writing

Where you are left

The gap between applied and certified is where margin goes. It is very hard to argue about months later and comparatively easy to ask about this week.

This checklist helps you capture and organise what exists. It does not tell you what you are owed, whether a notice was valid or in time, or whether to withhold, escalate or adjudicate. Those are decisions for your commercial team and your advisers. Not legal advice, not QS advice.

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