Cancel a Project Agreement Payment Request

This job aid describes how to cancel a project payment request. The cancelation is the same regardless of the project payment request type (e.g., milestone, rate table, or resource rate table). This task is restricted to supplier users with the assigned user role of Billing Submitter.

NOTE: ONLY payment requests with a status of 'Needs Approval' can be canceled. Payment requests with a status of 'Approval Pending' must be retracted from the approval process before they can be canceled. Payment requests in a status of 'Submitted for Invoicing' cannot be canceled.

How to create project-related payment requests is explained in the "Create Project Payment Requests" supplier job aid.

User role requirements for access to project payment requests is provided at the end of this document.

To cancel a project payment request:

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.

2. Use either the Project Agreements pull-down menu list in the header bar or one of your dashboard Projects hyperlinks to access your Project Agreements list screen.

3. Locate the project with the payment request you need to cancel, then select **manage project** in the Actions column drop-down selection list, and click the blue Go action arrow (→). The Project Agreement Transactions list screen displays.

4. Scroll through the transactions list to locate the payment request you need to cancel.

⚠️ ONLY payment requests with a status of 'Needs Approval' can be canceled so check the Status column to verify the current status of the payment request.
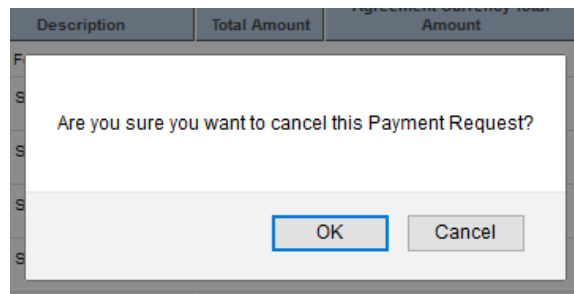
Project Agreement Transaction ID >	Project Agreement Transaction Type >	Description >	Total Amount >	Agreement Currency Total Amount >	Submitted Date >	Status >	Actions
4373913	Rate Table Payment Request	Expenses-Expenses	USD 3.00	USD 3.00		Needs Approval	view ▾ →
2895708	Resource Rate Table Payment Request	Resource Rate Table Payment Request	USD 27380.00	USD 27380.00	8/27/15	Submitted for Invoicing	view ▾ →
3080712	Resource Rate Table Payment Request	Resource Rate Table Payment Request	USD 29600.00	USD 29600.00	10/7/15	Submitted for Invoicing	view ▾ →

💡 **Tip:** Click the Status column header to sort the transactions list in either ascending or descending order by status. In ascending order, the 'Needs Approval' payment requests list before the 'Submitted for Invoicing' payment requests.

5. Select **cancel** in the Actions column pull-down selection list, then click the blue Go arrow (➡).

Project Agreement Transaction ID >	Project Agreement Transaction Type >	Description >	Total Amount >	Agreement Currency Total Amount >	Submitted Date >	Status >	Actions
4373913	Rate Table Payment Request	Expenses - Expenses...	USD 3.00	USD 3.00		Needs Approval	cancel ▾ →

6. Click **OK** in the pop-up window to confirm your intent to cancel. The system returns to the Project Agreement Transactions list screen and your canceled payment request is no longer visible in the transactions list.

Description	Total Amount	Amount

Are you sure you want to cancel this Payment Request?

[OK] [Cancel]

7. *Optional*: ⚠️ Canceled payment requests are NOT deleted from IQNavigator. Use the Search & Filter feature located at the top of the Project Agreement Transactions list screen to access canceled payment requests. Set the search Criteria 1 to Status, select Canceled from the

selection box, set the Filter to All, and then click the **search** button (Search). Your results will display in the list section.
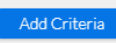

USER ROLE REQUIREMENTS:

Project Payment Requests access is limited to the following user roles:

- Billing Submitter -- ability to view and manage project-based milestone invoice requests
- Organization Supplier Project Manager – ability to view ALL project agreements within their system organization structure
- Supplier Project Manager – ability to respond to project agreements

If you need access to project-based files, please contact your supplier firm to have your IQN user profile adjusted.