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T&M ticket checklist: from the field to the invoice

os os.construction
Walkthrough 03

Use it the day extra work happens, and again at review. It follows one chain: daily log → T&M ticket → sign-off and review → change event → PCO.

01 Same day: the daily log

- [ ] Manpower: company, workers, hours, cost code, location
- [ ] Equipment: what ran, hours operating and idle
- [ ] A note: time, place, what you saw, who directed it
- [ ] Observation only. Leave pricing for the ticket
- [ ] Complete the day once the entries are in

02 The T&M ticket

- [ ] Work date = the day the work happened
- [ ] Description: who directed it and why it's extra
- [ ] One line per rate: labor, equipment, material
- [ ] Every line: quantity, unit, unit cost, cost code
- [ ] At cost. No markup hidden in unit costs
- [ ] Photos linked under attachments

03 Sign-off and review

- [ ] Signer's name typed in Signed By at submit
- [ ] Reviewer checks lines against the same day's log
- [ ] Ticket hours match the logged man-hours
- [ ] Changed lines after approval? Expect Draft + re-approval
- [ ] Rejected? Fix it and submit again

04 Carry it to the priced change

- [ ] Create the change event yourself (no automatic link)
- [ ] Set scope and type (e.g. Out of Scope, Owner Change)
- [ ] Same cost codes, quantities and unit costs as the ticket
- [ ] Attach the approved ticket (name + link)
- [ ] Create the PCO from the change event; markup goes there

05 Month-end check

- [ ] List every approved ticket for the period
- [ ] Each one has a change event with the ticket attached
- [ ] Any approved ticket with no change event is unpriced cost
- [ ] Clear that list before the pay application goes out

Field ticket (paper backup)

Title: _____ Work date: _____ Location: _____

TYPE	DESCRIPTION	QTY	UNIT	UNIT COST	COST CODE	AMOUNT
Labor						
Labor						
Equipment						
Material						
					Ticket total (quantity × unit cost, no markup)	

Directed by / signed by (name) _____ Date _____ Reviewed by _____

How it works in the app: os.construction/docs/using-the-app/tm-tickets · Daily log: os.construction/docs/using-the-app/daily-log.
Example values in the video are illustrative sample data. This checklist is general guidance; follow your contract's T&M and change terms.