**A&E and Related Services Invoice Requirements Consultant Checklist for**

Fixed Price Invoices

*\*See* [*OPO-STD-003-Consultant*](https://www.oregon.gov/odot/Business/Procurement/DocsPSK/inveq1.pdf) *for additional information on Invoice Requirements*

|  |  |
| --- | --- |
| **Fixed Price Invoice Data Requirements** |  |
| Price Agreement/Contract Number |  |
| Work Order Contract (WOC) Number |  |
| Total amount due for the billing period |  |
| Invoice Number |  |
| Invoice Date |  |
| Billing Period |  |
| Consultant Name, Address, Phone (if remit address is the same, state remit address is the same) |  |
| Remit address (must match consultant address of record). |  |
| Agency Project Manager Name |  |
| Consultant’s Project Manager Name |  |
| Task Numbers from Contract |  |
| Percent Complete of Each Task/Deliverable (if applicable) |  |
| Milestone Name and Numbers from Contract (if applicable) |  |
| Milestone Percent Complete (if applicable) |  |
| **Fixed Price Additional Requirements** |  |
| For Fixed-Price compensation using “Monthly Progress Payments for Percentage of Services Completed” payment option, Consultant invoices shall be limited to an amount commensurate with the percentage of the total Services (including deliverables) that were completed in the month invoiced. |  |
| Consultant shall prepare invoices based on the Fixed-Price amount (or Fixed-Price per Unit amounts) indicated in the Contract.  |  |
| Invoices for any tasks, contingency tasks or ODCs that are specified as T&M in an otherwise Fixed-Price Contract must include the detailed breakdown and documentation applicable to T&M compensation as required elsewhere in this document. |  |
| **Fixed Price Invoice Submittal Requirements** |  |
| “**Printed”** Font Size is to be legible or at least 12 pt.  |  |
| Submitted Monthly (or as indicated in the Contract) |  |
| Progress Reports |  |
| Separate Invoice per Contract |  |
| Paid Summary Report (as applicable - required for any Contract or WOC that includes sub-consultants) |  |

|  |  |
| --- | --- |
| **Invoice Requirements for Contingency Tasks**  |  |
| Amounts billed for authorized contingency tasks must be identified as separate line items from amounts billed for non-contingency (required) tasks (Notice-to-Proceed for each authorized contingency task must be kept on file). The amount for a T&M or CPFF contingency task must include all labor, overhead, profit, and expenses for the task. Direct non-labor expenses for contingency tasks must not be included in an overall amount for direct non-labor expenses applied to the budget for the non-contingency tasks. |  |