

**PROFESSIONAL SERVICE INVOICING: GRANTS AND LOANS VS. ISID CONTRACTS**

The following table provides guidance for preparing professional service invoices under Brownfield Grant and Loan agreements and Brownfield Site Assessments (BSAs) through an Indefinite Service Indefinite Delivery (ISID) contract. Items commonly confused between the two programs are highlighted in the table below. More information regarding invoicing for grants and loans can be found in the agreement and the Deliverables Guidance document. Invoicing information for the BSA program can be found in the ISID contract signed by the professional service provider. Additional invoicing questions should be discussed with your Brownfield Coordinator or BSA Project Manager.

Topic	Invoicing for Grants and Loans:	Invoicing for the BSA Program (ISID Contract):
<p><b>Detailed billing including:</b></p> <ul style="list-style-type: none"> <li>• <b>Staff names</b></li> <li>• <b>Date work was conducted</b></li> <li>• <b># of hours</b></li> <li>• <b>Rates</b></li> <li>• <b>Detail of equipment, mileage, and materials</b></li> <li>• <b>Subcontract or invoices</b></li> </ul>	<p>Detailed billing is required aside from rare occurrences where lump sum billing was approved in advance on select items which may include Phase I Environmental Site Assessments (ESAs), Baseline Environmental Assessments (BEAs), or contracted work bid as lump sum. Invoices must still include a date range when work was conducted and description of the activity. Certain lump sum items still require backup documentation to demonstrate the work was completed properly e.g., disposal documentation, landfill tickets, etc.</p>	<p>Detailed billing is always required.</p>
<p><b>Rates and staff</b></p>	<p>Rates charged and staff used must be reasonable, appropriate, and in accordance with an approved work plan.</p>	<p>Specific rates and staff are defined in the ISID contract. If staff need to be added or rates need to be adjusted, it needs to be done through a global modification of your ISID contract. Note: yearly rates are based on calendar year, not the state's fiscal year.</p>

Topic	Invoicing for Grants and Loans:	Invoicing for the BSA Program (ISID Contract):
<b>Beginning date of billing</b>	Cannot occur until after the grant or loan agreement is signed. Aside from those items specifically listed in the agreement, the beginning date of billing cannot be prior to the activity being approved in a work plan.	Prior approval from the BSA Project Manager is needed to bill for work prior to the approval of a contract order.
<b>Expiration/end billing date</b>	Work performed cannot be dated after the expiration of the grant or loan. However, if an extension is needed an amendment to the agreement must be requested and executed prior to the expiration. Be advised, this process can take a couple of months.	Professional service providers should monitor contract expiration dates, and, if needed, request extensions in timely manner. Contract extensions will be at the discretion of the BSA Project Manager.
<b>Markup</b>	A maximum of 10% markup is allowed on subcontractors and rental equipment fees. See Markup Guidance for further information.	No markup is allowed.
<b>Vehicle expenses</b>	Allowed but cannot be in addition to mileage.	No vehicle expenses are allowed.
<b>Mileage</b>	Mileage is allowed up to the federal mileage rate at the time of the activity but, cannot be in addition to a vehicle expense.	Mileage is allowed up to the federal mileage rate at the time of the activity if the job site is more than 100 miles from your nearest office. Only the mileage beyond 100 miles each way can be charged. Per the ISID contract, the first 100 miles each way is included in your rate.
<b>Payment Request Forms</b>	Grant or loan quarterly report / payment request forms are provided by your Brownfield Coordinator.	The Department of Technology, Management, and Budget 440 Form can be found <a href="#">here</a> .
<b>Status/Summary Reports</b>	A narrative of work completed, and work proposed for the next quarter must be provided in the quarterly report/payment request form.	A monthly summary document must accompany your invoice and include contract information, invoice duration, a summary of work performed, and a summary of upcoming work.