

## Invoicing Procedures

### Preparing invoices

Please continue to send invoices with the same frequency as you have in the past, however, if you have more than one, use Attachment A to invoice for multiple jobs at one time. **You should be invoicing Columbia within 2 weeks of weatherization work being completed at the home.**

The following information needs to be included on all invoices:

- Date
- Make payable to your address
- Invoice number
- Columbia Gas address is included on invoice along with contact information.
- PCID account number
- Name and address of customer
- Amount of each job
- You can leave “unit price” blank
- Must say invoice
- The terms must say payment due upon request.
- The amount on the invoice is not to exceed \$100,000.00.
- Please make sure you are uploading USS for each customer invoice.  
(Attachment B)
- **Once you have put the information in USS. Please go back and check to make sure the invoice was saved in USS. Then print and send to Jackie Martin.**

Once the data is completed in USS, print a copy and attach with the invoice and send to Jackie Martin along with the invoice for each job you are invoicing.

**The invoice and the USS report should be sent via e-mail to Jackie Martin.**

### **Scanning documentation**

**Please Note: All documentation packets need to be scanned & sent to Jackie Martin via e-mail within one week of invoicing.**

The packet must contain the following information:

- Letter sent to property owner
- Letter sent to owner of property (if landlord)
- Release signed by property owner (for landlord)
- Pre-Screen form
- DIS General account
- DIS Consumption History
- DIS Property owner page
- Warm choice audit form
- Release of information
- Clean and Tune invoice
- Repair authorization form
- USS measures listing (Attachment B)
- Invoice (Attachment A)

When sending the paperwork the following should occur:

- All information should be on 8.5x11 letter size paper (no legal or small bits of paper)
- When scanning, watch for any double sided documents you have. We need all of the pages.

If you have any questions about these guidelines please contact Jackie Martin.