

Section 8: Consultant Billing

Version 4.0

A. General

1. Pre-approval from Design must be attained prior to any invoice.
2. Consultants shall submit the base plan or design invoice for all locations of a specific work number at one time in order to minimize billing paperwork. Partial submittals will not be accepted.
3. All invoices shall stipulate the amount remaining in the contract after deducting the amount of that particular invoice.
4. All invoices shall reference the Water Department work number for that particular project and the Consultant's contract number with the City.
5. Invoices shall be submitted electronically to PWD-Invoices-ProfSvsPubWrks@phila.gov. The PWD Project Engineer and Eric LaCrosse (Eric.LaCrosse@phila.gov) shall also be copied on the email.
 - a. The subject line of the email shall include the consultant's name, the invoice number, and the date of the invoice.
 - b. Include an invoice header spreadsheet with any invoice. An example of this spreadsheet is located on WEXD under References/Contracting, named WS_InvoiceTemplate.xlsx.
 - c. Any attachments should be named in the format ConsultantNameInvoiceNumber_DateofInvoice. For example: LaBudaLLC123456_20200101
 - d. All emails shall be sent with a read receipt request. If the Consultant does not receive a read receipt within two business days, a follow up email without attachments should be sent requesting an update.
6. For additional information regarding invoicing, contact:
 - a. Thomas O'Farrell (Thomas.Ofarrell@phila.gov)
Philadelphia Water Department Finance Unit
1101 Market St.
Jefferson Center – 5th Fl.
Philadelphia, PA 19107

B. Monthly Reporting Process

1. All Consultants will submit monthly project and invoicing reports 10 days after the close of each month. If the 10th day of the subsequent month does not fall on a business day, reports may be submitted on the following Monday. Submissions must be made via PWD's Water Engineering External Documents (WEXD) Sharepoint site. There are two relevant folders:
 - a. References:
 - i. Monthly Reporting: Contains an updated Contract Summary Template for recording invoicing information.
 - ii. Resources: Contains policy documents relevant to monthly reporting and submissions to the Department.
 - b. Individual Consultant Folders:
 - i. Report Submissions: Location for uploading all monthly reports.
 - ii. Archive: At the close of the contract year, all monthly reports will be migrated to this sub-folder within the Report Submissions folder.

C. Invoice Submittals

1. Consultants may invoice for base plan preparation upon the completion and submittal of the base plans to the Water Department, Planning Unit. A copy of the preapproval e-mail described in Section 8 C.2. below must be included with the invoice.
2. Prior to submitting an invoice for unit price invoicing for Base Plans, the Consultant shall submit (e-mail) a request to the Water/Sewer Engineering Supervisor to confirm their linear footage (see Section 6 A. [110]). The Water/Sewer Engineering Supervisor shall reply with a preapproval e-mail for the Base Plans.
3. Consultants may submit invoices for a partial payment of 75% of the design fee once preliminary design plans have been submitted to the Water Department. A copy of the preapproval e-mail described in 4. below shall be included with the invoice. Consultants may invoice for the remainder of the design fee at the completion of the design process. The project is considered complete when the Consultant has submitted all of the documents required for contract finalization (See Section 7 E. [109]) and an approval memo has been issued. Again, a copy of the final preapproval e-mail described in 4. below shall be included with the invoice.
4. Prior to submitting an invoice for unit price invoicing for Design Work, the Consultant shall submit (e-mail) a request to the Water/Sewer Engineering Supervisor to confirm their linear footage. The Water/Sewer Engineering Supervisor shall reply with a preapproval e-mail for the Design Work. This may be done twice if provisions for 75% payment stated in 3. above is utilized.
5. For unit price invoicing, the Consultant shall show the respective linear foot estimates on the invoice for the Base Plans or the Design Work and unit price calculations along with the item number. The invoice must also include a copy of the respective preapproval e-mail for the Base Plans, 50% Design Work or final design package.
6. For hourly invoicing, the Consultant shall submit employee time sheets with the invoice to document all work hours covered by the invoice. The Consultant shall also submit a rate schedule if different from the original contract amount. Consultants may invoice monthly for each project as long as the invoice exceeds \$1500.00 unless it is the final invoice for the project.
7. The consultant shall submit a Contract Summary spread sheet (see template in Appendix IIIg) along with each invoice summarizing the amount invoiced for each project assigned and the amount remaining in the contract. It shall also show WBE and MBE payments to date and estimated construction costs.
8. Payment for final design shall not be made until the Consultant has submitted all of the documents required for contract finalization (See Section 7 E). The final approval memo must be included with the final invoice.
9. Each consultant will be required to submit an OEO Post Award Compliance form for each MBE and WBE partner (See Appendix IIIh). This form was included as an attachment to the original engineering RFP. At this time, the OEO form will not have to be submitted with each monthly invoice. This form, as well as the supporting documentation, should be submitted to the Design Branch at the end of each contract term (once a year).

D. Water and/or Sewer Design Work

1. Typically on water-only projects, Consultants are given both the base plan and the design portions of the project.
 2. Sewer projects may be sewer only or may be both water and sewer for any given location.
 3. If given only the base plan portion or only the design portion of the work, the consultant may bill the Water Department upon completion of the Water Department review and approval memo of that particular portion.
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E. Corrosion Control

1. The corrosion control engineering service shall be paid for by the Water Department directly to the corrosion control consultant. The corrosion control consultant shall invoice the Water Department directly. In addition, the Water Department shall receive a copy of the corrosion control report along with prints of the corrosion control plans if required.
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F. Green Stormwater Infrastructure

1. Green Stormwater Infrastructure shall be done on an hourly basis per the approved proposal, see B.6. above.
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G. Roadway Grading

1. Roadway Grading Plans shall be done on a linear foot unit price basis. Consultants may submit invoices for a partial payment of 75% of the design fee once preliminary roadway plans have been submitted to the Streets Department District Surveyor. The remaining 25% of the design fee can be invoiced once the grading plans are completed and have been approved/signed by the District Surveyor. Prior to submitting an invoice, the Consultant shall submit a request to the Water/Sewer Engineering Supervisor to confirm the linear footage. As part of the invoice documentation, the Consultant shall submit a copy of the letter transmitting the grading plans to the District Surveyor and the preapproval e-mail for the Roadway Grading Plans from the Water/Sewer Engineering Supervisor.

H. ADA Ramps

1. ADA ramp designs shall be invoiced on a unit price (each) basis. Identification of ADA ramps to be designed will be dictated by the Streets Department's paving letter and the PWD Project Engineer. Prior to commencing ADA ramp designs, the Consultant shall submit a request and proposal to the Water/Sewer Engineering Supervisor to confirm the locations and number of ramps. Consultants may submit invoices for ADA ramp design after the first submission to the Streets Department's ADA unit. As part of the invoicing documentation, the consultant shall submit the preapproval e-mail for the ADA ramp designs from the Water/Sewer Engineering Supervisor and a copy of the transmittal letter/email to the Streets ADA unit. It is expected that the ADA ramp design will be completed in a timely manner after submission of invoice.

Change Log

Version	Type	Change
4.0	Contact Update	Updated the contact information under 8.A.5. from Matthew Fulmer to Eric LaCrosse.
4.0	Format	Manual converted from PDF to web content.