

## How to use this Template

Please use this template for services rendered. If you would have reimbursable items, please use the reimbursement invoice. There is help text above most cells in the spreadsheet. Below and linked are our Invoicing Best Practices.

## Payment by Electronic Funds Transfer (EFT)

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Our preferred method of payment electronic funds transfer, depositing directly into your bank account via Automated Clearing House (ACH). Setting up ACH takes only a few steps:

1. You use our portal to set up your ACH information.
2. An employee calls you on the phone to verify your banking information.
3. The finance team sets up your banking information, which may take a few days.
  - a. Note: payments from United States Energy Foundation may show up as "United States." We are working with our bank this to change to "US Energy Foundation."

## Services versus Reimbursables

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Please use separate invoices to indicate services rendered and reimbursable expenses. We provide templates if needed. Receipts are required for all reimbursable expenses.

## Timing

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- Invoices should be submitted within 7 days after the time period when services were provided. For example, if you provide services in January and submit monthly invoices, you should submit your invoice by February 7.
- Your final invoice of the contract should be submitted within 15 days of the contract end date (as detailed in the contract).

## Invoicing Best Practices

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- The name on your invoice should match the name in your consulting agreement, which should be the same as on your W9. Any changes to name and/or address require an updated 1099.
- Indicate the time period when services were performed on the invoice. If you are using the template, you can use the start date and end date fields to specify the time period.
- Include your contract number in all invoices and correspondences.
- Use a unique invoice number for each invoice.
- We are moving to 30-day payment as standard. If you have other terms that were agreed upon in your contract, please indicate on the invoice.
- Please include a "Bill To" section in your invoice to indicate who is being billed for the services or reimbursable expenses. If you are billing the United States Energy Foundation.

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