LOUISIANA DEPARTMENT OF TRANSPORTATION & DEVELOPMENT

Consultant Contract Invoice Processing

Standard Operating Procedure

Bridge & Structural Design Section 25

09/25/2025

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1.0 Introduction

This SOP is supplemental to all applicable LADOTD Consultant Contract Services Section invoicing policies and guidelines and applies to all invoices for contracts managed by the Bridge and Structural Design Section.

Please notify the contact shown below immediately if this SOP requires modification.

2.0 Definitions

<u>Dollar invoice</u>: Invoice requiring a non-zero dollar amount to be paid

<u>LADOTD Bridge Design Contract Manager (CM)</u>: Individual responsible for Project Specific contract or IDIQ contract administrative oversight

<u>LADOTD Bridge Design Invoice Coordinator (IC)</u>: Individual responsible for the processing of invoices and resolving related issues

<u>LADOTD Bridge Design Project Manager (PM)</u>: Individual responsible for project

<u>LADOTD Bridge Design Task Manager (TM)</u>: Individual responsible for Task Order administrative oversight

<u>Project Specific Contract</u>: See Consultant Contract Services Manual

<u>ProjectWise (PW)</u>: The DOTD software used for managing DOTD project Consultant files.

<u>IDIQ Contract</u>: See Consultant Contract Services Manual

<u>Zero Dollar invoice</u>: Invoice requiring a zero dollar amount to be paid

3.0 Consultant Responsibilities

3.1 Invoice File Name Format

Type underscores between all elements and type hyphens between character groups:

3.1.1 Contracts with Project Number and Purchase Order Number

<u>File Name Content in Order Shown</u>:

1. Contract Number
2. Project Number or Task Order Number
3. Purchase Order Number
4. Billing Period End Date in Year-Month-Day Format

File Name Format:

Contract Number_Project Number or Task Order Number_Purchase Order Number_Billing Period End Date in Year-Month-Day Format.pdf

File Name Example:

44-12345_H.012345_22-123456_2025-07-26.pdf

3.1.2 Contracts without Project Number and Purchase Order Number

Contracts and Task Orders funded by the Bridge and Structural Design Section Professional Services Budget will have no Project Number and no Purchase Order Number.

File Name Content in Order Shown:

1. Contract Number
2. Task Order Number
3. Billing Period End Date in Year-Month-Day Format

File Name Format:

Contract Number_Task Order Number_Billing Period End Date in Year-Month-Day Format.pdf

File Name Example:

44-24186_TO4_2025-07-26.pdf

3.2 Upload Invoice to PW

Upon notification from CM or TM that consultant DOTD PW Inbox Invoice folders have been created, upload all invoices to the following PW location:

pw:\\PROJECTWISE.dotd.state.la.us:LADOTD_Corp\Documents_Consultants\
Consultant_Contract #\Inbox_DOTD\Invoices

3.3 Frequency and Grouping

Upload all invoices monthly, including Zero Dollar invoices.

Submit invoices associated with a Project-Specific contract as one document.

Submit Task Order invoices associated with an IDIQ contract as one document.

3.4 Invoice Contents and Information

Include the following with all invoices:

1. Invoice cover letter (optional)
2. Invoice Submittal Checklist
3. Required documentation in the Invoice Submittal Checklist
4. Summary of work performed during the billing period with sufficient detail to justify the work billed and signed by the consultant

3.5 IC Notification

IC contact information is shown on the Bridge and Structural Design Section website under Staff Directory.

After uploading all invoices into the PW folder, send a notification email to the IC with the Contract Number shown in the email subject line.

Do not include invoices in the email. Do not copy anyone.

Include a list of the uploaded invoices and the associated balance due for each.

4.0 Bridge Design Section Staff Responsibilities

4.1 PW Folder Creation

For new Projects, the IC, CM or TM follows LADOTD procedures to create a folder titled Invoices under the consultant's PW DOTD Inbox.

4.2 Invoice Review, Approval and Distribution

The IC will perform the following actions upon the consultant notifying the IC that invoices have been uploaded to PW:

1. Cursory invoice review
2. Attach PO Overview sheet for contracts having a PO
3. Review and approve DBE forms on behalf of CM or TM for Zero Dollar invoices

4. Review and approve Zero Dollar invoices by stamping the invoice and renaming file as shown herein
5. Review and complete invoice checklists to check for accuracy and consistency
6. Sign the invoice checklist on behalf of the LADOTD Project Manager for Zero Dollar invoices and as necessary
7. For Project Specific contract invoices, the IC will send a notification email to CM.
8. For IDIQ contract Task Order invoices, the IC will send a notification to TM and copy CM.

Notification emails will include the following:

1. Request invoice review
2. A link to access invoices
3. Notification of Zero Dollar invoice

CM or TM will have the option to review Zero Dollar invoices.

4.3 Invoice Review by CM or TM

Review invoice, including verifying the following as a minimum:

1. Invoice amount is commensurate with the work performed.
2. All supporting documentation adequately justifies the submitted hours and direct expenses.
3. Adequate funds are available for payment.

Complete invoice review within seven days of notification email receipt.

4.4 Invoice Approval by CM or TM

Upon finding the invoice to be satisfactory, the CM or TM stamps the invoice “Reviewed & Approved for Further Processing,” saves the file in the same PW folder and adds "approved" to the end of the filename.

<u>Example</u>:

If the reviewed invoice original file name is:

44-12345_H.012345_22-123456_2025-07-26.pdf

Once the invoice is approved, save the file and add "approved" as follows:

44-12345_H.012345_22-123456_2025-07-26_Approved.pdf

For Dollar Amount invoices, the CM or TM uses the notification email voting button and selects "**Approved**" or "**All Invoices Reviewed and Approved**" to indicate that the invoice(s) have been approved.

For Zero Dollar invoices, the CM or TM uses the notification email voting button and selects "**Zero Dollar Invoice(s). Ok.**" to acknowledge receipt of the Zero Dollar invoice.

No further action is required of the CM or TM after approving Dollar Amount or Zero Dollar amount invoices.

4.5 Invoice Rejection by CM or TM

If the invoice is not acceptable, the CM or TM marks-up the invoice, identifying all issues requiring correction. Depending on the complexity of the invoice issue(s), the CM or TM chooses one of the following options:

<u>Option 1</u>: The CM or TM saves the marked-up invoice in the same PW folder and adds "Rejected" to the end of the filename."

<u>Example</u>:

If the marked-up invoice file name is:

44-12345_H.012345_22-123456_2025-07-26.pdf

Then save and name the file as:

44-12345_H.012345_22-123456_2025-07-26_Rejected.pdf

The CM or TM uses the notification email voting button and selects "**One or More Rejected**" to indicate rejected invoice(s) that are to be returned to the consultant by the IC for correction.

<u>Option 2</u>: The CM or TM works directly with the consultant to resolve all invoice issues and copies the IC on all email correspondence. Once satisfactorily corrected, the CM or TM saves the approved invoice in PW in accordance with the "Invoice Approval" procedure above.

4.6 Invoice Submittal by IC

Upon voting notification from the invoice reviewer, the IC will upload approved invoices to CCS Invoice Processing Tracking system, or will return rejected invoices to the consultant as appropriate.

For Contracts and Task Orders funded by the Bridge and Structural Design Section Professional Services budget, the IC will forward approved invoices to the appropriate Administrative Assistant, who will set up payment for those invoices directly.

5.0 Contact Information

Inquiry Topic	**Contact**
Invoicing	IC and copy the CM
Contract	CM
Project	LADOTD PM and Bridge TM
SOP	Unit 008 Assistant Bridge Design Administrator