

DESIGNER'S GUIDE

V. Miscellaneous Issues (Revised March 3, 2008)

August 1, 2004



**Yale University – School Of Medicine
Project Management & Construction**

TO ACCESS SECTION CLICK ON TITLE IN INDEX

Table of Contents

V. MISCELLANEOUS ISSUES

INVOICES

SECURITY/ID CARDS/KEYS

PROJECT PHOTOGRAPHY BY CONSULTANTS & CONSTRUCTORS

APPENDIX V

EXHIBIT V-A – PROFESSIONAL SERVICES INVOICE FORMAT

V. MISCELLANEOUS ISSUES

INVOICES

In order for us to promptly process your invoices, please note the following:

1. Invoice must be on the company letterhead.
2. Invoice must be an original (no copies or faxes).
3. Invoice must have an original signature.
4. Invoice must include the Yale University Purchase Order Number.
5. Invoice must be in the appropriate format. See Exhibit in Appendix V.
 - Three copies with original signatures for Construction Requisitions for payment.
 - All other invoices in the approved format (see attached).
6. Ideally, if the invoice is less than \$25,000 the check should be issued within two weeks from the date it is received at 37 College Street. If the invoice is over \$25,000 the check should be issued within three weeks from the date it is received at 37 College Street.
7. All invoices need to come to PM&C Administrative Support personnel first so they can be logged. Do not hand invoices directly to Project Manager.
8. Provide back-up information for all reimbursable expenses.
9. Clearly indicate on invoices which sums are “basic service,” “reimbursable,” and NTE services (such as structural, field investigation, etc.) as per contract.
10. Clearly indicate on the final invoice that it is the final invoice by writing and highlighting on the invoice the words: FINAL INVOICE.

NOTE: YSM Asset Management requests that all vendors (designers and constructors) hold small billings (\$100 or less) and aggregate them into a larger billing for more efficient processing.

SECURITY/ID CARDS/KEYS

Get ID card through Margaret McDonald at Project Management & Construction (37 College Street). Designer will need to provide name and Social Security number for each person who will receive an ID.

Keys can be obtained at LEPH Room 173 at the Customer Service Center. The CSC hours are 7:30 a.m. to 6:00 p.m. The keys must be returned to the CSC by 5:30 p.m. The Project Manager must call ahead to the Customer Service Center to authorize verbally that the designer may borrow a key(s).

PROJECT PHOTOGRAPHY BY CONSULTANTS & CONSTRUCTORS

The following has been confirmed with representatives of the University's Office of Public Information for photographs taken by members of design and construction teams who work on our construction and renovation projects.

1. The project manager must be notified in writing before photographs are taken.
2. The photographer must be accompanied by a project manager or a representative of the occupant department's business office.
3. No Yale University faculty, staff or student may be included in photographs without their written permission.
4. No patients or research subjects will be included in any photograph.
5. Only photographs of projects specifically worked on may be included in documents such as annual reports, or brochures for the purpose of obtaining new commissions.

Publications (in addition to the above)

1. No photographs of Yale property or projects will be used as part of any advertisement.
2. No photographs may be used of Yale buildings, settings, or scenes that are not specifically part of a renovation or construction commission.

[Top of the Document](#)

APPENDIX V

See next page

[Top of the Document](#)

Exhibit V-A – Professional Services Invoice Format

EXHIBIT V - A

(Place Company Letterhead Here)
PROFESSIONAL SERVICES INVOICE

From: _____ Date: _____
 To: _____ Invoice No.: _____
 Project Name: _____ Purchase Order No.: PA _____ SO _____
 Proj. Number: _____ For the Period: From _____ To _____

In accordance with the Agreement dated [_____], there is due at this time for the above referenced project the following payment:

| <u>PHASE/SERVICE</u> | <u>CONTRACT AMOUNT</u> | <u>PERCENT COMPLETE</u> | <u>BILLED TO DATE *</u> | <u>PREVIOUSLY BILLED</u> | <u>CURRENT CHARGES</u> |
|-----------------------------|------------------------|-------------------------|-------------------------|--------------------------|------------------------|
| Pradesign Services | | | | | |
| Preliminary Design | | | | | |
| Design Development | | | | | |
| Construction Documents | | | | | |
| Bidding or Negotiation | | | | | |
| Construction Administration | | | | | |
| Close-out | | | | | |
| Additional Services | | | | | |
| TOTAL FEE | | | | | |

(Note: This is a sample format. The actual phasing or services shall be as outlined in the contract.)

SAMPLE

Reimbursable Expenses Summary BUDGET AMT.

| | |
|-------------------------------|--|
| Item 1 - Travel | |
| Item 2 - Communications | |
| Item 3 - Reproductions | |
| Item 4 - Postage & Handling | |
| Item 5 - Other Auth. Expenses | |
| TOTAL REIMBURSABLES | |

FOR FORMAT ONLY

TOTAL DUE THIS INVOICE \$ _____

* Billed to date includes current invoice

This Invoice accurately represents the compensation due for services performed during this period.

OUTSTANDING INVOICES

| | | |
|---------------|--------|----------|
| No. [_____] | [Date] | [Amount] |
| No. [_____] | [Date] | [Amount] |

TOTAL OUTSTANDING \$ _____

Sincerely,

[Authorizing Signature and Title]

Attachments: Backup Summary for....