Invoice instructions

Invoices may be submitted on a monthly or quarterly basis, within **two weeks of the end of the service period**. Note that you are responsible for tracking billable hours and ensuring that your billable hours do not exceed the annual not-to-exceed (NTE) amount or mid-year threshold. Please be reminded that your admin fees are inclusive of your NTE and not in addition to.

1. Include two separate files when invoicing:

    a. Invoice (PDF) on your organization's own form or letterhead with your organization's legal name, address (the same address as your W9), and the following*:

    - Unique invoice number
    - Invoice date
    - Contract number (PR0000xxxx)
    - Period of service dates
    - Quarterly admin fee as a line item (<u>billing accepted at end of quarter only</u>)
    - Hourly rate x total number of billable hours, total amount due

    *Note: You do <u>not</u> need to include a purchase order (PO) number. Our finance team will generate POs as invoices are approved. You will receive auto-generated notices of POs, indicating that payment of your invoice is in process.

    b. 2026 Business Client Report (Excel spreadsheet) that provides proof of service for your invoice, and documents the clients you served, billable hours, and relevant outcomes. Intakes must be completed before you submit your invoice. If you worked with the business in 2025 OR have been referred to the business by another advisor and they have an intake on file, you do not need to have a new intake completed. If you need to check either of these items, you can email Ixchel McKinnie and cc Amran Nur. You can download the Business Client Report spreadsheet and other items on the Advisor Online Toolkit page.

    - Only include the clients you are billing for during the period of service invoiced
    - Please ensure ALL fields are completed
    - Please include YOUR organization and the time frame at the top of the document
    - If idea stage, instead of "pre-venture" please put the name of the person as the business name

2. Email invoices and Business Client Report to Ixchel.Mckinnie@hennepin.us and cc: Amran.Nur@hennepin.us and Lily.Shaw@hennepin.us.

If you are interested in receiving payments via ACH rather than a mailed check, or if you have any updates to your mailing address, please reach out to Simran.Aryal@hennepin.us.

If you have any questions regarding the invoicing process, please reach out to Ixchel.Mckinnie@hennepin.us.

Thank you!
The Elevate Hennepin Team