



Texas Department of Insurance

Financial - Contract Administration, Mail Code 305-2C
333 Guadalupe • P.O. Box 149104, Austin, Texas 78714-9104

**CONTRACTED EXAMINATION
INVOICE**

Pursuant to the agreement between the Texas Department of Insurance and **CONTRACTOR NAME**, this invoice is forwarded for payment on services performed at the below named company. Under the terms of this agreement the Texas Department of Insurance finds this invoice is fair and reasonable.

Please remit payment by _____ directly to **CONTRACTOR NAME**, at the following address.

Contractor Name
Attn:
PO Box 0000
Anywhere, USA 00001

In addition, please provide a copy of the check for payment to **Jim Helfrich, Financial Contract Administrator**, at the address at the top of this invoice. We will use the information on the check copy for tracking purposes and to report to the Comptrollers Office for Premium Tax Credit. If you have any questions regarding this invoice, please call **Jim Helfrich at (512) 475-1867**.

Respectfully,

Larry Jackson
Financial Program Project Leader

EXAMINED COMPANY NAME	LOCATION (City, State)	BILLING PERIOD (month/year)	INVOICE DATE	INVOICE NUMBER

EXAMINER'S NAME	POSITION (partner, EIC, supervisor, etc.)	SALARY & FEES			TRAVEL EXPENSES (receipts attached)	
		HOURS	HOURLY RATE	SALARY & FEES	IN-TEXAS	OUT-OF-TEXAS
			\$	\$	\$	\$
TOTAL				\$	\$	\$

GRAND TOTAL	\$
ADJUSTMENTS (if applicable)	\$
AMOUNT DUE AND PAYABLE	\$

DO NOT REMIT PAYMENT TO THE DEPARTMENT OF INSURANCE



Texas Department of Insurance

Financial - Contract Administration, Mail Code 305-2C

333 Guadalupe • P.O. Box 149104, Austin, Texas 78714-9104

WHEN PREPARING THE INVOICE

COMMON DISCREPAINCIES

- ~ Inclusion of taxes when TDI is tax exempt
- ~ Charging for hourly rates in excess of the fee schedule
- ~ Substituting contracted staff without notification to TDI
- ~ Charging for expenses in excess of the Texas Travel Guide
- ~ Failing to provide receipts for expenses, e.g., motels, rental car, parking, cab.
- ~ Charging for services before the agreement execution date.
- ~ Charging for services after the agreement expiration date.
- ~ Not providing clear and concise detailed billings.
- ~ Status reports or updates on work performed do not match the invoice.
- ~ Not providing reports or updates as required by the agreement.
- ~ Not providing services and or goods as required by standards of performance contained in the RFP and the agreement.
- ~ Sending the invoice directly to the examined company without TDI certification.
- ~ Not sending the original invoice to Jim Helfrich at the address specified on the invoice, but instead sending it to the Project Leader.

DO NOT REMIT PAYMENT TO THE DEPARTMENT OF INSURANCE