**APPENDIX 2: INVOICING AND REPORTING GUIDELINES**

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| **HOW TO REPORT YOUR WORK WHEN INVOICING** |
| Using the Invoice Template provided, fill out the required identification and account details. |
| For **Services**, fill in the consultant title as indicated in your contract |
| For **Deliverables,** fill in the specific tasks as per your scope of work, attaching links to your work where applicable. Give details on the job done vis a vis the expectation to ensure clarity. |
| Where your assignment is broken down into tasks and timelines, indicate the task, timeline, pay rate per task (where applicable) and sum up the totals at the end. |
| Print out and sign your report and invoice then share it with your supervisor for verification before submitting to HR for approval and processing of payments. Please note that we do not accept Invoices in soft copy.  All invoices should be submitted before the last business day of the preceding month for processing, and payment thereafter, on the 15th of the same month. All invoices submitted late will be processed and paid on the 15th of the next month. For example, for work in January, submit your report and invoice on the last business day of January to be paid by February 15th. If you submit late, your invoice will be processed for payment on March 15th. |
| Once verified and approved, HR will attach a copy of your contract for the first installment payment of a contract, and submit to Accounts for processing of payments. Please note that your personnel file must be complete (with all required documents, such as ID, tax identification number, etc.) for HR to sign off on the invoice. |
| **Tax:** For payment, the Finance & Compliance department is required to deduct a certain amount based on your immigration status, contract type, deliverable schedule, etc. for remittance to the Kenya Revenue Authority. You can clarify with the Finance department how to reflect this on your invoice. There is a monthly deadline for remittance of taxes and withdrawal from the payment amount due is not optional or negotiable. |
| **Prorating:** Where partial work has been delivered or a partial month has been worked, the Institute’s pro-ration policy will automatically apply. In addition, payment is always contingent on your completing your deliverables on time, within budget and to the quality accepted by the Institute.The Finance Department has a fixed formula for pro-rating. Please seek clarification from the Finance Department (not from HR or the Project Supervisor) on this and other financial procedures. |

**APPENDIX 3: INVOICE AND REPORTING TEMPLATE**

**INVOICE**

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| **Full Name:** | **Start Date:** | **Cheques Payable to:** |
| **Department:** | **End Date:** | **Account Name:** |
| **KRA Pin No:** | **Submitted Invoice On:** | **Bank Name:** |
| **Mobile No:** | **Email:** | **Account No:** |
| **Service:** |  | **Branch Name:** |

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| --- | --- | --- | --- |
| **Deliverable** *(attach links as applicable)* | **Timeline** | **Rate** *(as applicable)* | **Total (Kshs)** |
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|  |  |  |  |
|  |  |  |  |
| **TOTAL** |  |  |  |

|  |  |
| --- | --- |
| **Consultant Name:** | **Signature:** |
| **Verification:**  I verify that the content above is accurate. | **Supervisor:** |
| **Approval:**  Approved for Payment. | **HR Manager:** |