

INVOICE REQUIREMENTS:

- All invoices must show a clear breakdown showing # techs, hourly rate, labor, materials, freight and sales tax, if applicable. “Lump Sum” or “As Quoted” invoices will immediately be rejected. **This is a tax authority requirement** and must be strictly adhered to.
- Boss Facility Services is not exempt from sales tax. Unless you are provided with a Resale Certificate by Boss for a specific state, you must include sales tax as required by the local tax regulations. Boss FSI is a facility service management company NOT a general contractor. Please consult your CPA if you are unsure if your services are taxable.
- All sign off documents must be submitted within seven (7) business days of the work completion date to ensure we are able to consistently meet the clients’ deadlines. Please contact our Billing Manager, Tatyana Benitez, to request an extension. The last thing anyone wants is to lose payment for all our hard work because we missed a deadline.
- Submit only one invoice per work order. Our system will not accommodate progress billings.

SIGN OFF REQUIREMENTS:

It is important to note that Boss’ UPC Sign Off sheets are designed to electronically process your pdf submittals as soon as they are received in our document queue. These forms ensure the documents are attached to the correct work orders and are processed as quickly as possible. This is critical to getting you paid as quickly as possible and will be a driving force as we prepare to roll out our Vendor Quick Pay Program.

- You are provided with a Boss UPC encoded sheet with every work order. This UPC sign off must be returned with your invoice. If your field techs use a company/electronic sign off document, please have your office submit the Boss UPC sign off sheet AND your company sign off together with the invoice. As noted above, this is critical to ensuring your invoice is processed correctly and as quickly as possible.
- If the client you are servicing requires you call in/out on their IVR system, it will be noted on the work order and you MUST do so. To avoid rejections, your sign off sheet in/out time must agree to the IVR time. More and more clients are rejecting invoices when vendors fail to IVR and/or the sign off times don’t agree to the IVR time. If the tech is unable to access the IVR system, have them note it on the sign off and have the site manager stamp it.
- Please obtain and submit a sign off for every site visit, whether you charge for the time or not. Your sign off sheets are the equivalent of a “job book” and are considered legal documents in the event of an insurance/legal claim.

Note: All billing documents must be submitted to billing@bossfacilityservices.com or faxed to 631-389-2217. PLEASE save the documents with the WO # in it. This will help the system confirm the file with the WO # on the UPC.

OTHER NOTEWORTHY REQUIREMENTS:

- We cannot issue any payments unless we have a valid W9 on file. [Click here for W9 form.](#)
- You must have a valid insurance certificate on file covering the service dates. If we don’t have a valid certificate when payment is issued you will be back charged 20% for Workers Compensation and/or 10% for General Liability.
- We make every attempt to contact you at least one week before the scheduled payment date to give you an opportunity to submit a certificate. Once the check is cut, you will not be reimbursed.

Note: All compliance documents should be submitted to vendorrelations@bossfacilityservices.com or directly through the vendor portal.

If you have questions pertaining to the information outlined above, please contact Eric Leder @ 631-361-7430 ext. 248 or at eleder@bossfacilityservices.com.