

## MEMORANDUM

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**TO:**  
**FROM:**  
**DATE:**  
**CC:**  
**RE:** Invoicing

### INVOICE APPROVAL

1. The Department's Invoice Templates must be used and must contain an itemized and detailed description of charges on a quarter-hourly basis, including the applicable billing rates and a per charge description of related travel or other expenses. **All travel and related expenses must be in accordance with the Commonwealth of Pennsylvania's Travel Policy. Allowances for meal subsistence are not flat rates and only amounts actually expended may be claimed. Reimbursement is subject to the limitations set forth in the Travel Policy. Reimbursement for alcoholic beverages and applicable tax are prohibited.**
2. All receipts, including meal receipts, must be provided for approval.
3. Invoices, Examiner Description of Services Sheet, Vendor Examiner Summary Sheet, Vendor Invoice Tracking and Vendor Summary must be sent to the Department on a monthly basis for approval. Please send emails to Bureau of Market Actions at [RA-IN-Mktactionexams@pa.gov](mailto:RA-IN-Mktactionexams@pa.gov) with a copy to

### INVOICING COMPANIES

1. Once the Department has approved a monthly invoice, the Vendor shall submit an invoice to the Company as soon as practical, but no later than 60 days after the date on which the billed activity was performed. Templates, forms, and policies can be found on the Market Actions Vendor Resource Webpage <https://www.insurance.pa.gov/Regulations/Pages/Market-Action-Vendor-Resources.aspx>
2. The invoice must provide a due date of no fewer than 30 days after the bill is submitted to the Company.
3. When the invoice is sent to the Company, a copy must be sent to the following Department Resource Account: [RA-INCOINVOICEMCEXAM@pa.gov](mailto:RA-INCOINVOICEMCEXAM@pa.gov). When sending the above information, please insert **"Vendor Invoice for [Name of the Company] Market Conduct Examination"** in the Subject Line of the e-mail. For example: if the Company being examined is ABC Life, your subject line would be **"Contractor Invoice for ABC Life Market Conduct Examination."**  
**When sending your billing packet to the Company, include the approval email from the PA Insurance Department.**

All pages of the invoice must be sent to the Company. This includes an itemized and detailed description of the charges, including the applicable billing rates and a per charge description of related travel and other expenses. Vendor Travel Worksheet must be included. Receipts do not need to be provided when submitting your billing packet to the Company. In the event of a dispute or official inquiry, supporting documentation can be provided on an "as needed" basis.