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**PRODUCTIVE LIVING BOARD**

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**INSTRUCTIONS FOR PURCHASE OF SERVICE ADDENDUM**

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**1. HEADINGS**

- A. "Billing Date" is the ending date of the monthly billing cycle. You will receive one invoice a month.
- B. "Voucher Number" is the number to the right of the Purchase of Service Addendum heading. This is an internal number used to identify each addendum, with a specific invoice.
- C. "Project No." is the PLB's four-digit project number assigned to your project.
- D. "Component No." is the PLB's two-digit component number assigned to your project.
- E. "Agency" is your agency's I.D. and name.
- F. "Total Units Approved" is the total units approved for reimbursement for the current fiscal year. This applies only to purchase of service projects.
- G. "Unit Cost" is the contracted cost per unit for purchase of service projects only.
- H. "Project Year" identifies the fiscal year of funding.

**2. COLUMNS**

- A. "SSN#" is the social security number for the consumer receiving services. This is required in order to process the invoice for payment. The agency should confirm this information with the consumer's social security card prior to submitting the addendum.
- B. "Name" is the consumer's full legal name (first and last). **Do not use initials or nicknames.**
- C. "YTD Units" will show the cumulative year-to-date units that PLB has paid for the consumer.
- D. "YTD Fees" will show the cumulative year-to-date fees that the consumer has paid for PLB units, if applicable.
- E. "YTD Amt" will show the cumulative year-to-date dollars that the PLB has paid for the consumer.
- F. "Units" - record the total units utilized by the consumer for the billing period indicated in the month/year field. **Do not include multiple months. When Purchase of Service Addendum is completed, total the "Units" column.**
- G. "Amount" - record the amount (units X unit cost) utilized by the consumer for the billing period indicated in the month/year field. **Do not include multiple months. When Purchase of Service Addendum is completed, total the "Amount" column.**
- H. "Fee" - record the fee (*if any*) collected from the consumer for the billing period indicated in the month/year field. **Do not enter unit cost in this field. When Purchase of Service Addendum is completed, total the "Fee" column.**
- I. "Month/Year" - Month/Year the service was provided. **Do not include multiple months.**

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**3. SIGNATURE**

- A. The signature of an authorized person is required on the addendum and the date that person completed the form.

The addendum should also be completed for grants, recording only the social security numbers and names of those consumers receiving service for the month/year indicated.

After completing the addendum, submit the Invoice of Expenditures, Purchase of Service Addendum and supporting documentation grouped by PLB generated Voucher Number, PLB project number and PLB component number of the same billing date. Keep a copy for your records, and send the original Invoice of Expenditures and Purchase of Service Addendum to the Office of Productive Living Services. See Invoice of Expenditures instructions for submission methods.