

Completing the Contract Work Summary Record Template

The “Contract Work Summary Record” is a Microsoft Excel based template that can be used to clearly capture all contractor costs affiliated with an individual project (or FEMA PA project worksheet). FEMA commonly requires using this template during project formulation and closeout to reflect all project contractor costs. This template can be found via XLS file, or PDF [here](#). This instructional document uses the XLS file template.

FEDERAL EMERGENCY MANAGEMENT AGENCY CONTRACT WORK SUMMARY RECORD				Page 1 of 1
1. APPLICANT SAMPLE NAME		2. PA ID #	3. PROJECT NO. 1	4. DISASTER NUMBER DR####
5. LOCATION/SITE 1 Main Street			6. CATEGORY A	7. PERIOD COVERING 1/15/2018 to 1/16/2018
8. DESCRIPTION OF WORK PERFORMED Debris removal				
DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	

The following information provides a detailed step-by-step approach to accurately completing a Contract Work Summary Record form.

Completing the Components of the Form

Page Numbers

Depending on the number of entries captured in the Contract Work Summary Record, it might be necessary to create multiple tabs within the Excel file. Each tab within the Excel file should be assigned a page number in the “Page” section.

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5. LOCATION/SITE 1 Main Street			6. CATEGORY A	7. PERIOD COVERING 1/15/2018 to 1/16/2018
8. DESCRIPTION OF WORK PERFORMED Debris removal				
			BILLING/INVOICE	

The following fields will repeat at the top of each tab housed in the Excel file, and should be completed each time a new tab is created.

1. Applicant

The Applicant (or Subrecipient) should be populated with the official name of the entity as it appears on the FEMA project worksheet. For example, “Sample Name” should be replaced with the Subrecipient’s name.

FEDERAL EMERGENCY MANAGEMENT AGENCY CONTRACT WORK SUMMARY RECORD	
1. APPLICANT	2. PA ID
SAMPLE NAME	#
5. LOCATION/SITE	
1 Main Street	
8. DESCRIPTION OF WORK PERFORMED	

2. PA ID

The “PA ID” refers to the Public Assistance (PA) Identification number that was assigned by FEMA to the Applicant (or Subrecipient) and appears on each FEMA project worksheet (under the PA ID field.) That number should be populated in this field.

FEDERAL EMERGENCY MANAGEMENT AGENCY CONTRACT WORK SUMMARY RECORD	
2. PA ID	3. PROJECT NO.
#	1
6. CATEGORY	
A	

3. Project No

The “Project No” refers to the project worksheet number that was assigned by FEMA for this specific project worksheet. That number should be populated in this field.

FEDERAL EMERGENCY MANAGEMENT AGENCY CONTRACT WORK SUMMARY RECORD	
2. PA ID	3. PROJECT NO.
#	1
6. CATEGORY	
A	

4. Disaster Number

The “Disaster Number” refers to the major disaster number assigned by FEMA at the time of disaster declaration; this number will start with “DR- #####” That number should be populated in this field.

	Page 1 of
3. PROJECT NO. 1	4. DISASTER NUMBER DR-####
6. CATEGORY A	7. PERIOD COVERING 1/15/2018 to 1/16/2018

5. Location/Site

The “Location/Site” refers to either location(s) in which the work occurred for this specific project worksheet. If work occurred at multiple locations, it would be allowable to list “various locations” or in lieu of a location, it would also be fine to list the project worksheet name as it appears directly on the project worksheet. For example, “Main Street”

FEDERAL EMERGENCY CONTRACT WORK	
1. APPLICATION SAMPLE NAME	2.
5. LOCATION/SITE 1 Main Street	
8. DESCRIPTION OF WORK PERFORMED	

6. Category

The “Category” refers to the FEMA PA category of work assigned to this specific project worksheet. For example, debris removal activities would fall under Category A.

MANAGEMENT AGENCY MARY RECORD	
#	3. PROJECT NO.
	6. CATEGORY A

7. Period Covering

The “Period Covering” refers to the dates of work as captured within the listed invoices. That specific time period should be accurately recorded in these fields.

	Page 1 of 1
0. 1	4. DISASTER NUMBER DR-####
A	7. PERIOD COVERING 1/15/2018 to 1/16/2018

8. Description of Work Performed

The “Description of Work Performed” should include a brief, high-level description of the work performed by the contractors whose invoices are included in the claim for this project worksheet. For example, “Debris Removal.”

FEDERAL EMERGENCY MANAGEMENT CONTRACT WORK SUMMARY R	
1. APPLICANT SAMPLE NAME	2. PA ID #
5. LOCATION/SITE 1 Main Street	
8. DESCRIPTION OF WORK PERFORMED Debris removal	

Recording Each Contractor Entry

Each line (or row) in the Excel file should capture information related to one vendor invoice.

For “**Dates Worked**”, the dates should only cover the period of time captured on the invoice.

8. DESCRIPTION OF WORK PERFORMED Debris removal				
DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal

For “**Contractor**”, the name should be listed as it appears on the invoice. When possible, try and use an employee's legal name to avoid confusion during forthcoming reviews.

DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal

For “**Billing/Invoice Number**”, the invoice number as it appears on the actual invoice should be listed. If there is no invoice number, please list it as “**N/A.**”

8. DESCRIPTION OF WORK PERFORMED Debris removal				
DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal

For “**Amount**”, the total amount of the claimed amount for this PW should be listed. For instance, if an invoice captures services for a variety of work that might be claimed under different projects, you should only include the eligible costs that will be claimed for the PW/project that is listed at the top of the XLS form.

DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal

For “**Comments/Scope**”, very briefly describe the eligible scope of work completed and being claimed for this project worksheet.

DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal

Complete these steps for each contractor invoice being claimed for this project.

Finalizing the Contract Work Summary Record

Once all Applicant details have been entered and each contractor invoice has been included, confirm that the “**Grand Total**” has the correct, summarized, total contractor costs being claimed for the PW.

FEDERAL EMERGENCY MANAGEMENT AGENCY CONTRACT WORK SUMMARY RECORD				Page 1 of 1
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5. LOCATION/SITE 1 Main Street		6. CATEGORY A	7. PERIOD COVERING 1/15/2018 to 1/16/2018	
8. DESCRIPTION OF WORK PERFORMED Debris removal				
DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS-SCOPE
1/15/2018 to 1/16/2018	Tree Removal Service Inc.	1234	\$ 700.00	Downed tree, branches, and vegetative debris removal
to			\$ -	
to			\$ -	
to			\$ -	
to			\$ -	
to			\$ -	
to			\$ -	
to			\$ -	
to			\$ -	
to			\$ -	
			GRAND TOTAL	\$ 700.00
I CERTIFY THAT THE ABOVE INFORMATION WAS OBTAINED FROM PAYROLL RECORDS, INVOICES, OR OTHER DOCUMENTS THAT ARE AVAILABLE FOR AUDIT.				
CERTIFIED	TITLE	DATE		

Once these total contractor costs have been confirmed, the authorized agent for this project (or Applicant) should sign and date the form as indicated before submitting to FEMA for review.