



# **U & C**

# **Task Reference**

# **Guide**

**For use in preparing Usual & Customary  
Standardized Invoices**

# I. TASK REFERENCE GUIDE

## Task 1-Groundwater Sampling

For all sub-tasks invoiced, GS05, GS10, GS15 or GS25, a copy of the laboratory chain of custody must be included. Summary results tables allow for a quick summation of samples taken over multiple mobilizations.

For GS10 the chain of custody will include one or more of the following: nitrates, dissolved iron, sulfate, methane, dissolved manganese, (natural attenuation indicator parameters).

Dissolved Oxygen (DO), collected under GS10; must be conducted concurrent with groundwater sample collection event. (Note: Cost of the meter included in mob/demob rate).

If only GS20 is claimed, a copy of the summary table of results or field notes must be provided, to indicate wells where water level measurements were taken, but were not sampled.

Sub task GS30-Temporary Well Abandonment must be conducted concurrently with groundwater sampling; no separate mobilization for this sub task.

## Task 2-Annual Groundwater Monitoring Report

For either sub-task invoiced, AGMR05 or AGMR10, a copy of the complete report, or the portion that has been completed to date, must be submitted with the claim.

**Note: If a complete report is submitted with the claim, the consultant may submit one invoice for report preparation or they may submit multiple invoices.**

If report costs are submitted in *multiple claims* a copy of what has been completed in that billing period must be attached to the invoice they are claiming the report costs on.

If claiming costs for OMR10, the reviewer must verify in the report that Free Product Abatement (Task 3) was done.

## Task 3-LNAPL Assessment & Removal

For either subtask invoiced, LAR05 or LAR10, copies summary thickness/recovery tables or field notes that verify LNAPL measurement/removal.

Post-investigation phase LNAPL removal events are limited in frequency to no more than once per quarter. Exception: possible additional one if concurrent with LAR06.

LAR06-LNAPL sample collection limited to one **sampling event** per site.

Note: "0" thickness entries are ok; we pay for the attempted measurement.

(For a more complete description of LNAPL assessment requirements see *ASSESSMENT GUIDANCE FOR SITES WITH RESIDUAL WEATHERED*

## Task 4-Waste Disposal

For all subtasks, WD05, WD10, WD15, WD20 or WD25, a copy of the disposal invoice is required.

**The cost of drums is no longer included in the activity maximums for WD10, WD15 and WD20. This is now a separate subtask (MDT21) under Task 15.**

Note: If drums are claimed at the same time as the disposal and were invoiced by a driller, a copy of the driller's invoiced would also be required.

Disposal documentation (i.e. receipt, discharge permit, etc) must be provided, especially when Activity WD17 (Landfill Environmental Fee) is utilized. Actual landfill disposal costs will not be reimbursed without proof of actual cost

## Task 5-Closure Request

For all subtasks, CR05, CR10, CR15 or CR20, a copy of the complete report, or the portion that has been completed to date, must be submitted with the claim.

**Note: If a complete report is submitted with the claim, the consultant may submit one invoice for report preparation or they may submit multiple invoices.**

If report costs are submitted in *multiple claims* a copy of what has been completed in that billing period must be attached to the invoice that report costs are claimed on.

When claiming CR10 must submit LNAPL assessment report; one-time allowance; may be a separate reporting activity (from Closure Request submittal) with prior department approval, (if so, then not incremental to CR05). For contents of assessment report see 2nd paragraph of Task 5 specifications.

When claiming CR15 check the BRRTS web page for fee paid.

When claiming CR20, a copy of the GIS property/plume map showing the property boundaries must be included to verify the number of properties involved.

If closure is sought concurrent, i.e. the final recommendation is for closure, with task 22 (Soil Investigation Report) or task 23 (Soil and Groundwater Investigation Report) this cost item is not also eligible with the exception of the incremental cost for LNAPL removal reporting and GIS packet preparation and submittal.

## Task 6-Letter Report/Addendum

To claim costs for LRA05, a letter report or addendum must have been requested by either DSPS or the DNR and it must include new data collection results.

**This task may not be used to remedy omissions or corrections for the following tasks: annual groundwater monitoring report, closure request, letter report/addendum, regulatory correspondence, site investigation**

**report, investigation work plan preparation, soils and water investigation report, cap maintenance plans, change order requests and claim submittal.**

Example of eligible cost: Closure is denied-PM requests 2 more rounds of sampling; this would be new data.

Example of non-eligible cost: Consultant cannot claim this task to prepare a work plan to collect new data. (Note: this would require a variance approval since only the initial site investigation workplan preparation, Task 9, is on the U&C Schedule).

A copy of the complete report, or the portion that has been completed to date, must be submitted with the claim.

**Note: If a complete report is submitted with the claim, the consultant may submit one invoice for report preparation or they may submit multiple invoices.**

## **Task 7-Regulatory Correspondence**

No more than 12 can be claimed in a 12 month period for RC05.

This task includes labor to prepare and submit status reports, periodic reporting, teleconferences, requests for copies of existing documentation and ***general written correspondence to responsible party and regulatory agency(s)***. This reimbursement maximum is limited to 12 per 12-month period.

Phone calls or brief emails are not considered regulatory correspondence. Emails about a site or specific subject must include all questions/clarifications within the initial correspondence; this will count as 1 RC. Multiple one- or two-line emails to gain clarification of the ***original subject*** will not be reimbursed as regulatory correspondence.

This Task can also be utilized in conjunction with TASK 20 when a government entity, such as a municipality, state, city, Township, county, etc, requires written notification of the installation of a soil boring or monitoring-well *or requires annual renewal of the permit* but does **not require a permit fee and does not issue a formal permit (see TASK 20 for specifics)**.

**This task may not be used to remedy omissions or corrections for the following tasks: annual groundwater monitoring report, closure request, letter report/addendum, regulatory correspondence, site investigation report, investigation work plan preparation, soils and water investigation report, cap maintenance plans, change order requests and claim submittals.**

## **Task 8-Well Abandonment**

For all subtasks a copy of the well abandonment form(s) must be attached to the invoice.

On the well abandonment form, for WAB15, look at Part 3 to determine total well depth and if necessary, depth to water value.

Must measure the total well depth if WAB10, WAB40, WAB45 or WAB50 is claimed.

If WAB15 is claimed, confirm the water column footage by subtracting the depth to water value from the total well depth to get the water column footage. If greater than 30', WAB15 rate applies to the entire well.

Temporary Wells, if not identified as a temp well (TW vs. MW), look at part 3 for a casing diameter of < 2". If construction type is driven (sandpoint), it is likely a temp well. May need to also have the construction log to verify if temp wells.

**Note: Task 8 can only be used for abandonment of temporary wells when installed prior to 5-1-06. For temp wells installed after 5-1-06, the abandonment cost is included in Task 1 (Groundwater Sampling), subtask GS30, Temporary Well abandonment.**

## Task 9-Investigation Workplan Preparation

Only one workplan will be reimbursed per site. The intent is this task is for preparation of a site investigation workplan since NR716 is referenced in the specifications. This is not for a changed workplan or remedial workplans.

For sub-task IWP05, a copy of the complete report, or the portion that has been completed to date, must be submitted with the claim.

**Note: If a complete report is submitted with the claim, the consultant may submit one invoice for report preparation or they may submit multiple invoices.**

If report costs are submitted in *multiple claims* a copy of what has been completed in that billing period must be attached to the invoice they are claiming the report costs on.

**This task can only be claimed once and is for an activity *before* an SI starts. This cannot be used to develop a Scope of Work (SOW) for a different or later activity.**

## Task 10-Initial Site Survey-Features & Well Elevations

If claiming IS10, there should be data regarding well elevation(s) which can be provided on the well construction logs for any new wells, with the elevations annotated. Elevations can also be shown on water level summary tables.

If claiming IS15, a copy of the site survey map (or base map) is required. A copy of the subcontractor invoice would be required if a commodity provider does the work. This subtask may only be reimbursed once per site.

Beginning with this version of the U & C Schedule (Schedule #8) a second "Initial Site Survey" will be reimbursed for those sites that the department has identified as "stalled". A "stalled" site is a PECFA eligible site that has made little to no progress towards closure for a reasonable period of time (to be determined by the department) from the last date for which active progress can be documented.

**Written Department approval is required prior to performing any services associated with a second site survey. Reimbursement for these services may only be awarded if the written approval documentation and the lack of active progress documentation are included in the claim for which a reimbursement request is made for a second survey.**

## Task 11-Potable Well Field Reconnaissance

For subtask PWFR05, copies of the field notes are required; there also may be a brief paragraph in the report.

## Task 12-Direct Push

**For sites subject to public bidding, (>\$60K, actual or estimated cost), this task is limited to 40 feet total project drilling without prior department approval.**

Copies of consultant's boring logs are required if claiming costs for any subtasks under this task.

For DP05, DP10 and DP30 the consultant's boring log, including field screening data, must be provided.

DP15 & DP45 Will have boring logs but will not show any soil sampling. Boring logs should show depths where groundwater samples were collected.

**Note: Cannot also claim DP20 or DP70 when claiming either of these sub tasks.**

DP20, DP50 & DP70 Requires a chain of custody.

**Note: For reimbursement of DP20 or DP70 a groundwater sample must have been collected from the subject boring and submitted for laboratory analysis.**

DP25 & DP75 Require well construction forms.

**Note: temporary well abandonment is covered under Task 1 (Groundwater Sampling), subtask GS30; cannot also charge for monitoring well abandonment under task 8.**

**Note: DP45 can be used for the advancement of a temporary well borehole.**

DP55 Chain of custody required. Should only be claimed when groundwater samples are collected, one for each GW sample. Ok if no sample was collected, and in that case, the boring log should annotate the failed attempt.

DP60 Requires abandonment forms. **Note: No form is required if < 10' of boring and did not intersect the water table. If short footage on abandonment forms, verify on boring logs if boring was <10'.**

DP65 Verify surface cover on boring log-**Note: Asphalt is not considered concrete penetration.**

**Note: DP80 includes decontamination cost.**

## Task 13-Drilling

**Drilling that exceeds 75' per boring must have prior department approval.**

**For sites subject to public bidding, (>\$60K, actual or estimated cost), this task is limited to 40 feet total project drilling without prior department approval.**

Copies of consultants boring logs are required if claiming costs for any subtasks under this task.

13. a. For DR05, DR10, DR15, and DR20 a copy of the consultant's boring log, including field screening data, must be provided.

13. b. DR25, DR30 Boring logs required-will show no soil samples (blind drill)

13. c. DR35, DR40 Boring logs required. To verify competent bedrock, you will see auger refusal or high blow counts > 50. **Note: If also claiming subtasks under 13.b., there will not be any blow counts, will only be auger refusal.**

For 13. d. & 13 f. see 13. c. above.

## Task 14-Monitoring Well Installation

MWI05, MWI10, MWI15 Requires a well construction form to document footage.

MWI20 Requires a well development form.

MWI25 can only be claimed with MWI20 and #4 and #5 on the well construction form will need to confirm the sealing material.

**Note: The consultant/commodity provider will come back on a different day from the drilling date to complete this subtask.**

**Both MWI20 & MWI25 must be on the same invoice, never on separate invoices.**

## Task 15-Miscellaneous Drilling Activities & Supplies

MDT05 Well construction form required.

MDT10 If claimed, check #2 (protective cover pipe), on the well construction form. See note.

MDT15 If claimed check to see if #2 is complete. See note.

**Note: Flushmount covers are typically 9" in diameter and 1' in length; stickup covers are typically 3-4' long by 4" wide.**

MDT20 This is always used in conjunction with MDT15, never with MDT10.

**MDT 21 Drums-Copy of vendor (who provided the drums) invoice required.**

MDT25 Commodity service provider only (driller or direct push). Must show proof that work was required on the same site for 2 consecutive days with an overnight stay (field notes should show this). The unit charge is a per person rate including meals & overnight stay; 2 person maximum. Cannot be used in between jobs.

MDT30 Prior department approval required; copy of correspondence required.

MDT35 Abandonment forms required; for drilled boreholes only, not for wells. For well abandonment use Task 8.

MDT40 Need boring log(s) to verify surface cover. **Note: Asphalt is not considered concrete penetration.**

MDT41 Copy of invoice from Private Utility Locate Company required.

MDT45 Only 1 per well.

## Task 16-Hand Auger Boring

For sites subject to public bidding, (>\$60K, actual or estimated cost), this task is limited to 10 borings without prior department approval.

Boring logs required for costs claimed under this task. **Note: No separate abandonment footage cost associated to this task. MDT35 does not apply. HA05 already includes abandonment cost.**

If greater than 10' or groundwater is encountered, borings must be abandoned with bentonite and Task 8 WAB20 would apply.

## Task 17-Surface Soil/Sediment/Water Sampling

For sites subject to public bidding, (>\$60K, actual or estimated cost), prior department approval is required if the number of sample locations will exceed five.

Chain of Custody form(s) required.

## Task 18-Vapor Screening

Field notes with PID results required.

This is a one time event, department approval required if more than one per site.

This should be done in conjunction with another task, no separate mobilization; incremental mobilization (Task 34) does not apply.

## Task 19-Hydraulic Conductivity Testing

For sites subject to public bidding, (>\$60K, actual or estimated cost), this task is limited to no more than two wells without prior department approval.

Field notes or a results table required.

**Note: May be referred to as 'slug test' or 'baildown' testing.**

## Task 20-Soil Boring/Monitoring Well Permits

For both subtasks SBMWP05 & SBMWP10, a copy of the permit(s) is required.

There are two exceptions to this requirement, both of which require prior department approval – 1) When a government entity, such as a municipality, state, city, township, county, etc, requires written notification of the installation of a soil boring or monitoring well but does **not require a permit fee and does not issue a formal permit; and 2) Annual permit renewal.** In both cases, notification costs would be reimbursed under TASK 7.

Subtask SBMWP10 is reimbursement for the actual fee cost of the permit.

A notification to a municipality (vs. an actual permit), is claimed under Task 7.

## Task 21-Access Agreements

Copy of the access agreement(s) required.

Cost is allowed for each applicable off source property.

Can only attempt one execution for each off source property.

## Task 22-Soil Investigation Report

A copy of the complete report, or the portion that has been completed to date, must be submitted with the claim.

**Note: If a complete report is submitted with the claim, the consultant may submit one invoice for report preparation or they may submit multiple invoices.**

If report costs are submitted in *multiple claims* a copy of what has been completed in that billing period must be attached to the invoice they are claiming the report costs on.

**Note: If closure is concurrent with SI, cannot also claim Task 5 subtask CR05; the closure request is part of Task 22.**

## Task 23-Soil and Groundwater Investigation Report

A copy of the complete report, or the portion that has been completed to date, must be submitted with the claim.

**Note: If a complete report is submitted with the claim, the consultant may submit one invoice for report preparation or they may submit multiple invoices.**

If report costs are submitted in *multiple claims* a copy of what has been completed in that billing period must be attached to the invoice they are claiming the report costs on.

**Note: If this task is claimed and there is no indication of any GW investigation, we may only allow up to the Task 22 maximum.**

**Note: If closure is concurrent with SI, cannot also claim Task 5 subtask CR05; the closure request is part of Task 23.**

## Task 24-Limited Soil Excavation

**Only applies to sites not subject to public bidding, (>\$60K, actual or estimated cost).**

Cannot exceed \$10,000 *including* lab costs.

Should be a brief report describing activities. Disposal tickets, lab results, chain of custody, field notes, all sub contractor invoices, etc., are required to be submitted when claiming costs for this task.

Disposal documentation (i.e. receipt, discharge permit, etc) must be provided, especially when Activity LSE16 (Landfill Environmental Fee) is utilized. Actual landfill disposal costs will not be reimbursed without proof of actual cost.

## Task 25-Remediation System Shutdown

Field notes required for any subtask claimed under this task.

For SSD10-Temporary shutdown, can only be performed once per year without prior department approval.

## Task 26-Site Specific RCL Calculations

One time event.

Table in a report required or if prepared as a standalone document, could also claim Task 7.

## Task 27-Claim Submittal

This task is for the preparation and submittal of a complete claim by a certified public accountant, independent contractor, or other independent preparer. Submittal events are based on milestones.

Documentation must be submitted in a claim to substantiate that the activities for which the claim is being made have, in fact, been performed and completed.

Supporting documentation includes, but is not limited to: commodity service invoices, field notes, laboratory chain-of-custody, monitoring well construction logs and abandonment forms, borehole logs and abandonment forms, reports, waste disposal tickets, etc. Each piece of supporting documentation must be attached to the invoice on which the activity appears.

**This task will be reimbursed for a complete claim only. Failure to provide required documentation to support costs claimed may result in the entire claim being denied, including the claim preparation cost!**

**Additional costs to remedy omissions or corrections for this document are not eligible.**

## Task 28-Standardized Invoice

One required for each invoice submitted in a claim for reimbursement, where the U&C Cost Schedule applies.

All appropriate documentation for costs claimed must be attached to each invoice; i.e., boring logs, chain of custody, well construction & abandonment forms, borehole construction & abandonment forms, disposal tickets, field notes, etc.

**Not required for public bid sites; if cost claimed it will not be reimbursed.**

## Task 29-Occurrence Classification

**This is a one-time reimbursement.**

For the preparation of an occurrence classification (score sheet) form **completed and received by DSPS on or prior to February 28, 2008.**

Note: This was a one time event to obtain information about sites in order to classify them in accordance with the changes to Comm 47 that occurred on May

1, 2006. Site classification is no longer relevant and there should be no costs incurred for this task after February 28, 2008; **costs for this task claimed after this date will be denied at claim review.**

## **Task 30-Meeting with Regulators**

Must have prior approval from DSPS or DNR. Meeting is at agency office or a pre-approved site meeting is also eligible. This is a per visit charge.

**Note: A phone conference can only be claimed under Task 7.**

Field notes and documentation from respective agency required.

With prior department approval this task can also be used to review files for “stalled sites”. It can only be used once per site and the review must take place in a DSPS or DNR office.

A “stalled” site is a PECFA eligible site that has made little to no progress towards closure for a reasonable period of time (to be determined by the department) from the last date for which active progress can be documented.

## **Task 31-Consultant Overnight Per Diem**

Can only be used on a site by site basis. Consultant must show it is more cost effective to stay overnight as opposed to traveling back & forth. (Benchmark is 50 miles one way from consultant’s office to the site).

Field notes or logs required to show that work was done on the same site on 2 consecutive days.

Task can be claimed by a consultant only not a commodity provider (driller or direct push operator can claim MDT25 under Task 15).

## **Task 32-Deed Restriction Preparation**

Copy of the deed restriction required.

This must be a legal property description document that is filed with the register of deeds office.

If a property restriction is written into an agency closure letter (DNR or DSPS), this task cannot be claimed.

Cannot be claimed if consultant recommends the use of this mechanism in the closure request

## **Task 33-Laboratory**

Costs claimed for laboratory must include chain of custodies.

Laboratory schedule should be completed for all costs claimed, however, if not completed and the invoice amounts can be verified against schedule we would not require this.

A separate charge for S22 & S24 is not allowed if they are conducted in conjunction with other contaminant analyses.

## **Task 34-Incremental Mob/Demob**

Need to verify the eligibility of this task when claimed. Can only be used for additional tasks performed on the same day as the primary task and for which there is a consultant primary mob/demob activity.

## **Task 35-Cap Maintenance Plan**

The cost of this activity is to prepare & submit a cap maintenance plan only when required at the conclusion of a remediation as per ch. NR 726, not for implementation of the plan.

Copy of maintenance plan required.

One time reimbursement.

Does not include GIS Packet reimbursement maximum.

**This task will be reimbursed for a complete plan only. Additional costs to remedy omissions or corrections for this document are not eligible.**

## **Task 36-Change Order Request**

The cost of this activity is for the preparation & submittal of a change in scope of services request.

A copy of the change order request is required.

Does not include GIS Packet reimbursement maximum.

Not to be used for a bid cap modification request or a bid contingency notification to DSPS; (U&C & bidding are mutually exclusive of each other).

Cost is allowed once per request.

**This task will be reimbursed for a complete request only. Additional costs to remedy omissions or corrections for this document are not eligible.**

**Task 7-Regulatory Correspondence is not allowed if the Department has to do an additional information (AI) request.**