



Completed-work billing review

The crew finished. Use this sheet to check what the billing records actually cover and who will resolve the next step.

Review date

Reviewer / role

Review period / cohort

1. Agree what belongs in this review.

1. Choose distinct completed jobs in one review window. Include older unresolved jobs deliberately. A closed visit may be only part of a larger job; confirm the work delivered.
2. Count jobs, not invoice documents. Match the exact work and agreement. A deposit or partial stage invoice does not by itself confirm coverage of all completed work. Check grouped billing and service agreements.
3. Separate jobs with confirmed billing coverage from other jobs on a documented legitimate hold. Count each job once. Missing or incomplete evidence remains unknown.

2. Bring a count to the conversation.

A blank is unknown, not zero. Enter 0 only when confirmed. Covered jobs plus other held jobs cannot exceed jobs reviewed.

Distinct completed jobs reviewed

Jobs with confirmed billing coverage

Other jobs on a documented hold

Jobs needing a closer review

3. List the records that need another look.

Internal reference	Covered / held / unknown	Evidence / record checked	Owner / next check

Use only internal references here. Continue longer lists in your existing records.

Closer review = reviewed jobs - covered jobs - other held jobs, only when all three counts are known. This does not prove unpaid debt or lost revenue. All accounted for applies only to these entered counts.



One finished job. Confirm billing coverage.

Use one copy for a record that still needs an answer. Confirm evidence before taking the next action.

Internal record reference

Review date

Responsible person / role

Next check date

1. Match the records.

Compare completion evidence with the agreement and the work covered by invoices. Check for existing billing elsewhere before preparing another invoice.

Completed work / sign-off evidence

Invoice references and work covered

Deposit / stage / grouped billing / hold evidence

2. Name what is known and what is waiting.

A legitimate hold needs a reason, owner and review date. If coverage or a hold cannot be confirmed, keep the answer unknown until the records establish it.

Confirmed status, or what remains unknown

Reason for waiting / evidence still needed

3. Give the next step an owner.

Next action and the person who will do it

Next check: date, record to reopen and what will confirm the answer

Your authorized team decides what is due and handles invoicing in its usual tool. Confirm the records again before treating a missing match as an invoice to create.