

Typical Utility / Telecommunications Audit Timeline

Approach:

The technical approach to the utility bill audit will be tailored to the needs of your organization. Typically, we follow a three-phase process. There is an organizational phase (phase 1), an audit phase (phase 2), and a claims resolution phase (phase 3). They are described as follows:

PHASE I — AUDIT SET UP (Approx. 45 days)

- Compile client information (including invoice copies, account lists, facilities list, contact information, and contracts)
- Order transcripts from investor-owned, municipal and cooperative utility and phone providers
- Organize data for audit phase

PHASE II — DETAILED AUDIT/Audit Master Software™ (Approx. 2-8 weeks)

- Conduct detailed review of all monthly charges including rates, demand reads, taxes, riders, adjustments and special contracts
- Validate monthly charges against applicable rate cards, tariffs, and rate spreadsheets
- Identify billing errors

PHASE III — REFUND CLAIM NEGOTIATIONS (Approx. 4-8 weeks)

- Report billing errors to utility vendors, requesting refunds
- Negotiate appropriate credits or refunds
- Provide Final Management Summary Report documenting refund