

WELCOME KIT

Thank you for the opportunity to verify your Utility and Telecommunications invoices. We are honored to have you as a client. Our objective is to provide you with a thorough and timely audit of your invoices to ensure their accuracy and cost efficiency.

Enclosed is your Welcome Kit. Please provide a copy of the kit to anyone in your company who will be involved with the audit.

What you may expect from us:

- 1) A thorough analysis of your past billing histories (within the statute of limitations) to uncover billing errors
- 2) Verification of services billed according to tariff or contract
- 3) Identification of services that are billed but not utilized
- 4) Identification of services that billed unnecessary make-up charges or minimum charges
- 5) Identification of tariffs that offer reduction in usage cost
- 6) Changes made to your accounts only upon written authorization from your company
- 7) Periodic updates
- 8) Final report with refund/savings summaries, and listing of all accounts that have been reviewed for accuracy and cost efficiency.
- 9) Invoices based on actual refunds and actual savings amounts
- 10) Documentation provided to support calculation of savings on invoices
- 11) All client information is kept strictly confidential

What we ask from you:

- 1) Provide invoice documentation and letters of agency
- 2) Provide a point of contact to assist us in questions regarding your accounts
- 3) Identify all pre-existing investigations or negotiations with any account that should be excluded from the audit before the audit begins
- 4) Provide a response to our inquiry emails, phone calls, letters, etc. within five business days
- 5) Provide a response to our Audit Savings Opportunities within five business days
- 6) Refer vendor inquiries received during your audit to our audit staff
- 7) Prompt payment of our invoices-invoices are due upon receipt

Working together within these guidelines will ensure that we are able to deliver our best work and will result in a valuable management tool for cost control.

Please list all billing issues currently under review to be excluded from the audit.

Utility / Telephone Provider Name	Account Number	Issue

Attach page if necessary

ONLINE ACCESS:

If you have established online access for bill account information, please provide your current Utility and Telephone online account user information:

Utility	Account # (If applicable to all accounts, please write "All")	User ID	Password

Online access allows for a more detailed review of past history. If online access has not been setup prior to the audit, your Audit Team will initiate account access set up:

- Telephone Accounts: The Audit Team will request a PIN number from vendor. Once received from vendor, you should fax the PIN number or access letter from the telephone provider to the Audit Team. **NOTE: PIN codes have expiration dates - please request all staff responsible for account information to fax PIN code expiration letter to the Audit Team as soon as possible at: 336-315-1153.**
- Wireless Accounts: The Audit Team will contact you on how to setup access from wireless phone(s) and how to forward the information to the Audit Team.

Refund and Savings Opportunities Process:

- The Audit Team will notify you and identify billing error issues. The Audit Team will contact the vendor and request that the account is corrected and a credit be issued to your account.
- The Audit Team will identify savings opportunities and provide you with a detailed savings analysis. Savings are identified as:
 - Reduction in unit cost
 - Removal of charges, fees, surcharges, and taxes
 - Removal of minimum or make up charges
 - Correction of billing rates, charges, fees, surcharges, and taxes
- The Audit Team will provide to you the appropriate documentation to authorize any change(s). The Audit Team will not implement any Savings Opportunity without your written authorization.
- Signed authorization letter(s) should be faxed directly to the Audit Team for implementation with utility or telecommunications provider. We ask that you respond to our Audit Savings Opportunity correspondence within five (5) business days.
- We ask that you refer all utility and telephone inquiries to the Audit Team after audit startup. To ensure vendor accuracy; if a vendor contacts you please ask them to contact the Audit Team. Most inquiries from vendors are due to requests the Audit Team has made to the vendor.
- Compensation resulting from credits and savings opportunities is based on a shared percentage.

Audit Team: Randy Lewis
Nina Dickson
Penn Smith
Franklin Skinner
Misty Holleman
Leslie Clayton
Toni Lewis

- **Audit Timeline:** The audit process will take approximately 6-8 weeks to complete (depending on size and complexity, it may take longer)
- **Audit Completion:** A final written report will be provided that details all findings. Our mutual goal is to have all refunds and savings opportunities implemented by the completion of the audit.

Approved by:

Date
