Utility Advocate Audit

Process & Policies

I. UA Sales Rep presents Utility Advocate to client and asks if they would like to have UA perform a free utility bill audit on their behalf.

2. UA Sales Rep completes UA Audit Submission Package with the client.

3. UA Sales Rep obtains the client's most recent available utility bills (all pages).

4. UA Sales Rep emails the Audit Submission Package and the bills to audits@utilityadvocate.com or faxes them to (203)262-6001 Attn: UA Audit Proposals.

5. UA to confirm a complete package has been received; Sales Rep will be notified via email (File Received). If submission in not complete or forms are missing, the Sales Rep will be notified via email (File Rejected) along with an explanation as to what is missing.

6. Within 3-5 business days after a complete package has been received, UA Customer Relationship Manager will call the Client to review preliminary savings, qualify and or close on any additional products submitted. If there is a Merchant Service opportunity, Client will be contacted by a UA partner directly.

7. UA will notify the Sales Rep via phone call or email as each product is closed throughout the audit process.

8. UA will notify the Sales Rep and Client with an Audit Conclusion email outlining any findings the audit produced.

9. UA will notify the Sales Rep about the receipt of credits and or refunds via a phone call or an email and will invoice the client for their portion.

10. Commissions will be paid the next appropriate pay period after we receive payment from the client.