

**Utilities Assessment, Recovery  
and Optimization**  
**(Confidential - For Program Use Only)**



**DESCRIPTION OF PROGRAM DELIVERABLES**

**Step One**

Assessment referral arrives to E2 Energy.  
Reviewer ensures all gas, electric, water, waste and third party bills copies are included.  
If potential recoveries/savings are identified service agreement is sent to client.

**Step Two**

Enrollment goes to Auditor for action items as follows:  
Auditor will scan, & archive enrollment.  
Agreement is sent back to E2 from the client and the auditing process begins.  
Client is immediately added to the database.  
Auditor to immediately proceed with action items follow up.

**Step Three**

Once Auditor has concluded the results of the assessment, the file is submitted to client for review and approval to:  
(1) Proceed with the refund claim.  
(2) Retrieve further information required to proceed with claim.  
(3) Any Barriers at this point will create an immediate action item to be addressed.

**Step Four**

At this stage; the claim has been filed and logged for future tracking and continuous follow up until the refunding process has been completed and a confirmation has been obtained from the refunding party.  
Any barriers to completion at this stage will be addressed one-on-one with Client to assess future action.

**Step Five**

Step 5 is critical in terms of accuracy, efficiency and timeliness in processing the audit file and subsequently, the request for refunds.

- Auditor is to perform actions necessary to ensure that all claims/requests have been received, reviewed, approved or denied.
- Successful Claims are to be added by providing specific dates, amounts, and pending receipt dates for refund.
- Claims considered PENDING or UNSUCCESSFUL are to be addressed immediately with a plan of action or notice of discontinuance.

**Step Six**

While in Step 6: Auditor will be responsible for the following:  
(1) Notation of follow up calls and dates to process applications pursuant to refunding entity's rules.  
(2) Any outstanding issues to be addressed.  
(3) Ensure prompt follow up with utilized or refunding entity until complete.  
(4) Any action that appears to be delayed or lagging must be met with immediate attention and effort to resolve.

**Step Seven**

This is the final stage of the assessment process and involves the following:

- Obtaining refund amount and dates of refund.
- Creating and sending client Invoice for contingency fees.
- Notify client of progress and proposed final refund amounts, etc.
- Follow up with notification to client on payment of invoice.

• Final stage is complete upon receipt of refunds and credits to client and payment by client to E2 Energy.

## ADDITIONAL SERVICES

### Energy Procurement

Let our energy procurement team and our advanced cloud based procurement platform secure the best electricity & natural gas rates for you!

### Wholesale Energy Programs

Ask us about our new wholesale energy programs for large users.

### Efficiency & Software

Your Buildings May be Wasting Up To 30% or More in Energy Usage! This Translates Into Billions of Unnecessary Energy Expenditures and Millions of Tons of Unnecessary Greenhouse Gas Emissions Released into Our Atmosphere Annually. We have a "Best-In-Class" service provider network including AECOM, Building IQ, CloudEnergy Software, and Energy Information Solutions Agency.