Utility Refund

Audit Flow Chart

www.utility-refund.com

Case Received

Keely's responsibility

Case Submitted

Receipt Confirmed To Introducer with prelim response

Preliminary Audit Check List KD

Upload Checklist to CMC KD

Case Passed To Admin Staff or Parked

Back to PAC

Case

Accepta-

Case Not

Acceptable

Case Passed To Case Administrator For Inputting.

Diary Note Made For Follow Up (automatic)

Case Fully Input By Case Administrator.

RFD Completed and Submitted to Supplier.

Diary Note Made For Follow Up 5 days.

Introducer Emailed Regarding Missing Information.

Case Parked Not chased (introducer email on block 1xm)

Case not managed until returned complete.

RFD Not Received Back.

A Further Request Issued by Case

Administrator and Diarised on CMC

RFD Received Back.

RFD Not Received Back.

Administrator Updates CMC with RFD Information and Passes Back To KD.

KD Create Task for AT to provide quote

Diary Note Made (automatic)

A Tudge to complete usage rates.

A Tudge to approximate quotation and upload result onto CMC for later use.

CMC Updated

Audit

No Refund Due

No Refund Due

Letter to client AT

Diary Note (automatic)

Audit report and notes completed CB GH KD AT

Refund Due -Case Auditor Progresses Claim and submits forms, updates CMC and diarises.

Copy Bills requested

Refund requirements & Forms Completed.

When Forms Complete, submit to supplier & Diarise for Follow Up.

Case Complete

Chase Up

Bill Received

No

Yes

AT +£10k or -£10k invoice Issued and case closed when paid.

Diary Notes Made

Send To AT For Invoice and Diarise