



# Audit Summary for: City of Santa Fe



**TROY & BANKS**  
*Utility and Telecommunication Consultants*

**CONTENTS:**

<b><u>Topic</u></b>	<b><u>Page</u></b>
<b>I. Audit Categories</b>	<b>1</b>
<b>II. Methodology of Audit Process</b>	<b>1, 2</b>
<b>III. Audit Results</b>	<b>2, 3</b>
<b>IV. Total Credits and Savings</b>	<b>3</b>

**Corporate Offices:**

**BUFFALO - NEW YORK**  
2216 Kensington Avenue  
Kensington Avenue  
at Saratoga  
Buffalo, NY 14226  
(800) 499-8599  
(716) 839-4402  
Telefax (716) 839-4452

**Branch Offices:**

**CALIFORNIA**  
398 E. Carob Ave.  
Fresno, CA 93654

**FLORIDA**  
3980 W. Broward Blvd.  
Ft. Lauderdale, FL 33312

2330 Warbler Circle  
Lakeland, FL 33810

**NEW YORK**  
Rockefeller Center  
Post Office Box 3968  
New York, NY 10185  
(212) 699-0621

450 Jericho Turnpike  
Suite 203  
Mineola, NY 11501  
(516) 746-0992

**OREGON**  
111 SW Harrison St. 1D  
Portland, OR 97201

**TEXAS**  
6418 Eckhart Rd. #3101  
San Antonio, TX 78240

**VIRGINIA**  
325 East Bayview Blvd.  
Suite #201  
Norfolk, VA 23503  
(757) 932-1414

e-mail:  
save@troybanks.com

internet address:  
www.troybanks.com

To : City of Santa Fe  
Liza Kerr

From : Justin Raybeck  
Energy Auditor/Advisor

Date : 7/27/2016

**Audit Summary for City of Santa Fe**

**Overall Findings - Prepared by Troy and Banks – Justin Raybeck**

**I. Audit Categories**

The following audits were performed:

- Electric
- Natural Gas
- Telecom
- Tax
- Streetlight

**II. Methodology of Audit Process**

Troy and Banks deployed a four step process to complete the audit:

**Step I: *Collection of Billing Information***

Troy and Banks was provided with an invoice copy for each of the accounts that were to be audited.

**Step II: *Ordering of Historical Customer Service Records***

Troy and Banks reached out to all vendors and requested historical billing records for each account.

**Step III: *Detailed Audit***

Once billing records were received and the tariffs were reviewed, Troy and Banks audited each account. The following are just some of the items that were evaluated for each account:

- Incorrect Monthly Charges
- Incorrect Rate Assignment
- Alternate Rate Schedules
- Abnormal Demand Reads
- Abnormal Usages
- Multiple Month Billings
- Applicable Riders
- Applicable Credits or Discounts
- Incorrect Delivery Voltage Levels and Meter Multipliers
- Incorrect taxes

**Step IV: Claim Resolution & Future Savings Evaluation**

As incorrect billing items and opportunities for future savings were identified, claim letters were submitted to the appropriate vendors.

**III. Audit Results**

**Electric:** A review of all electric accounts led to the submittal of six claim letters. Two letters were submitted for questionable historical billings and after discussions with the utility, one account was agreed to be billed in error. The credit information is below.

<u>Account Number</u>	<u>Credit Amount</u>
040246003-0445030	\$14,439.95

Four claim letters were submitted for potential future savings items (rate schedule changes). Two accounts were eligible for different rate schedules and were changed in May 2016. The estimated annual savings is below.

<u>Account Number</u>	<u>Rate Change</u>	<u>Annual Savings</u>
040487304-0447238	EN2V to TOU-EN0A	\$5,000
115942947-1170495	TOU-EN5K to EN2V	<u>\$6,700</u>
		\$11,700

**Natural Gas:** An analysis of all Natural Gas accounts led to the submittal of one claim letter. After discussions with the utility, the account was found to be billed accurately. Accounts are being billed correctly. No overcharges were identified.

**Telecom:** All telecom invoices and histories have been reviewed and no overcharges were identified.

**Tax:** All accounts were reviewed to verify that exempt tax charges were not being applied. Two Centurylink accounts were found to be billed incorrectly. The credit information is below.

<u>Account Number</u>	<u>Credit Amount</u>	<u>Item</u>
69123571	\$1.36	USF Removed
505-471-4047	\$51.08	Excise Tax Removed

**Streetlight:** An analysis of all streetlights led to the submittal of one claim letter. After discussions with the utility, an item was agreed to have been billed in error. The credit information is below.

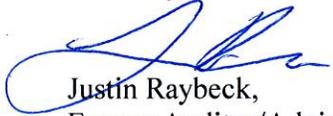
<u>Account Number</u>	<u>Credit Amount</u>
41993500-1280606	\$2,205.79

**IV. Total Credits and Savings**

<u>Item</u>	<u>Account #</u>	<u>Refund/Annual Savings</u>
Credit	040246003-0445030	\$14,439.95
Credit	69123571	\$1.36
Credit	505-471-4047	\$51.08
Credit	41993500-1280606	\$2,205.79
Future Savings	040487304-0447238	\$5,000
Future Savings	115942947-1170495	<u>\$6,700</u>
		<b>\$28,398.18</b>

Please review the summary and if you have any questions or concerns, please feel free to contact me at 716-517-3962 or [jraybeck@troybanks.com](mailto:jraybeck@troybanks.com).

Sincerely,



Justin Raybeck,  
Energy Auditor/Advisor