Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

3.3.2.1 Start Premise Based Service

July 2012

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Chapter 1

Overview

This chapter provides a brief description of the Start Premise Based Service business process and associated process diagrams. This includes:

- **Brief Description**
    - **Actors/Roles**

Brief Description

Business Process: 3.3.2.1 Start Premise Based Service

Process Type: Sub-process

Parent Process: 3.3.2 Manage Service Agreement

Sibling Processes: 3.3.2.3 Stop Premise Based Service, 3.3.2.2 Start Non-Premise Based Service, 3.3.2.4 Stop Non Premise Based Service, 3.3.3.2 Determine Customer Deposit, 3.3.1.1 Establish Person and/or Account, 3.4.1.1 Manage Customer Contacts, 5.3.2.1 Manage Field Activities and Field Orders, 3.4.4.1a Enroll in Budget, 3.4.4.1b Enroll in Non-Billed Budget, 4.3.2.1 Manage Collection Process, 5.1.5.1 Manage Metered Site

This process describes the typical Start Service processing. After receiving a Customer request to Start Service, 5.1.5.1 Manage Metered Site, 3.3.1.1 Establishing Person and/or Account, a Service Agreement(s) is created that determines relationships between the Service Provider and Customer.

Actors/Roles

The Start Premise Based Service business process involves the following actors and roles.

- **CC&B**: The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR CC&B:** CSR or Authorized User of the Customer Care and Billing application.

Chapter 2

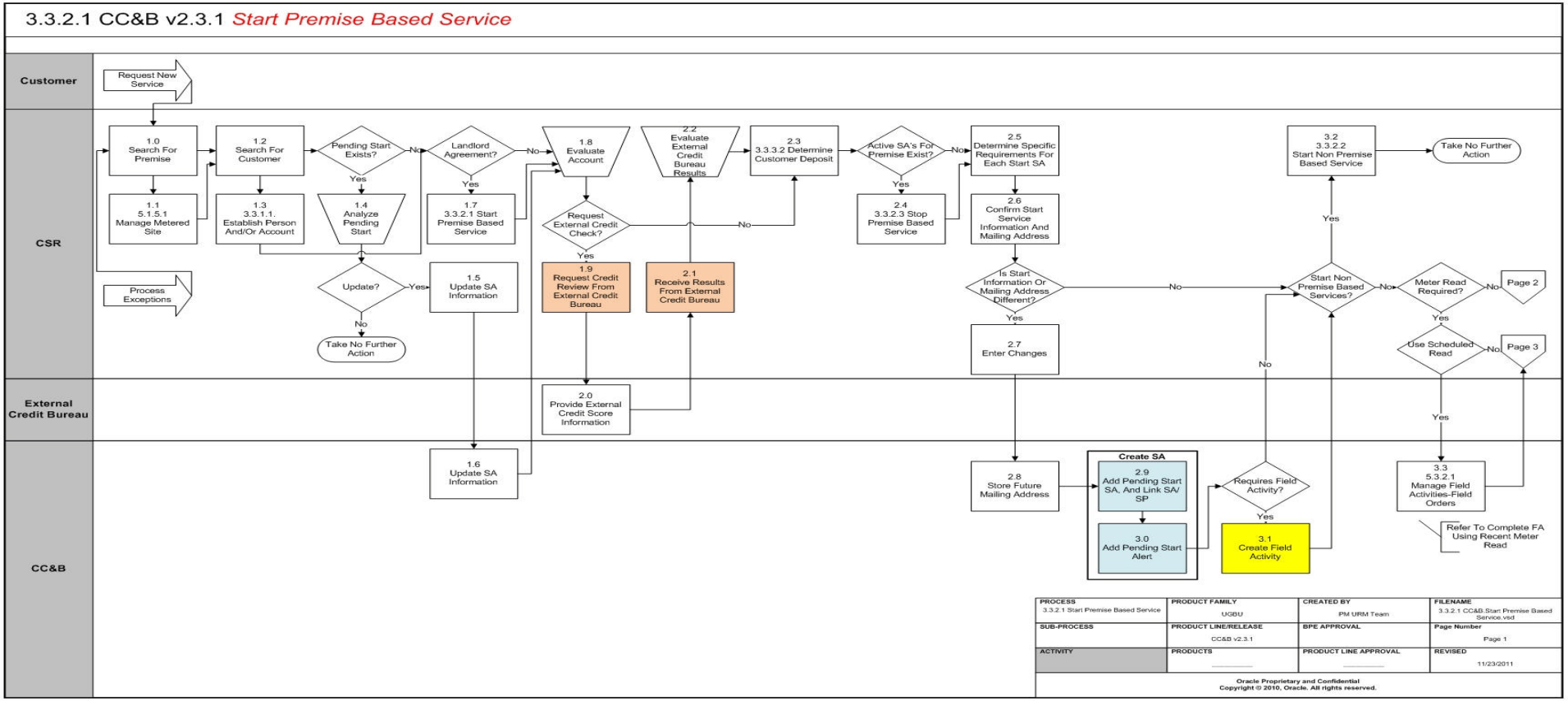
Detailed Business Process Model Description

This chapter provides a detailed description of the Start Premise Based Service business process. This includes:

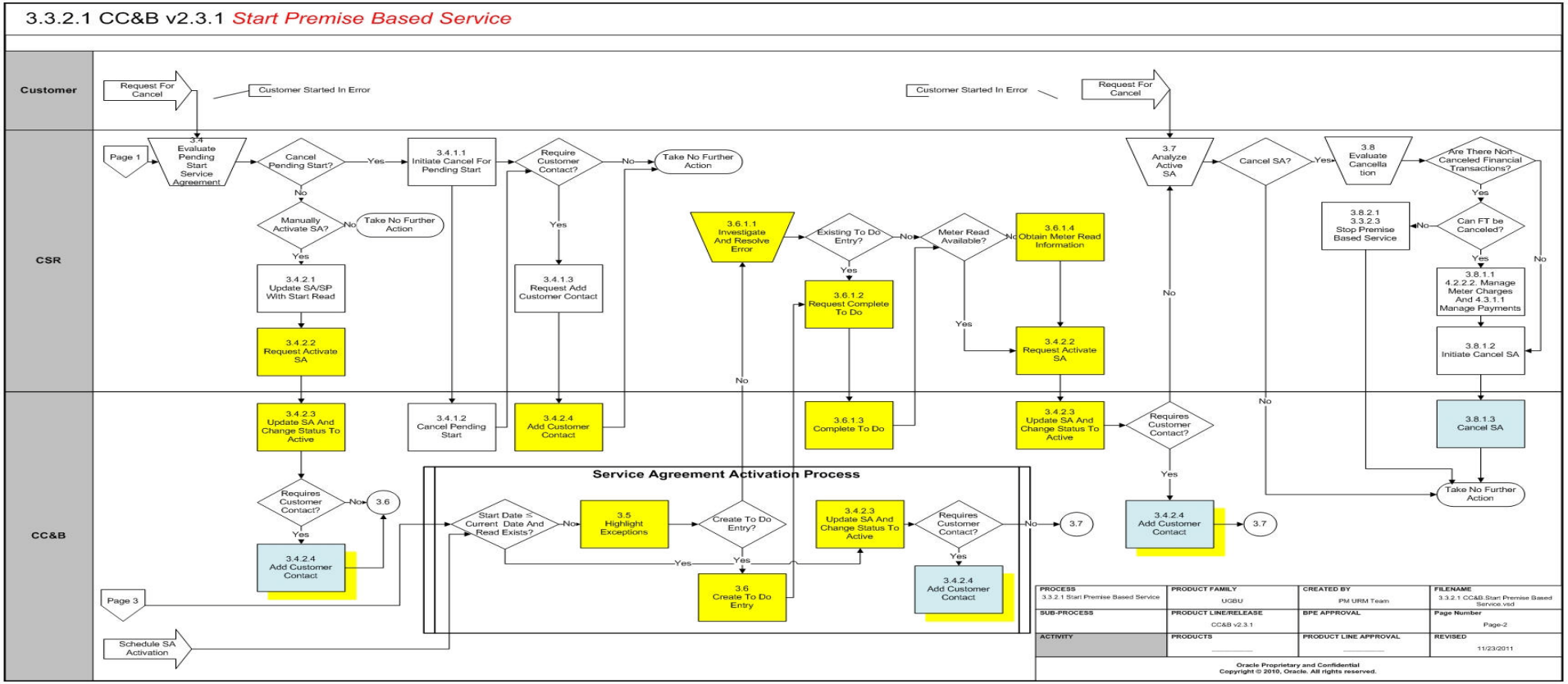
- **Business Process Diagrams**
  - **Start Premise Based Service Page 1**
  - **Start Premise Based Service Page 2**
  - **Start Premise Based Service Page 3**
- **Start Premise Based Service Description**
- **Installation Options - Control Central Alert Algorithms**
- **Related Training**

Business Process Diagrams

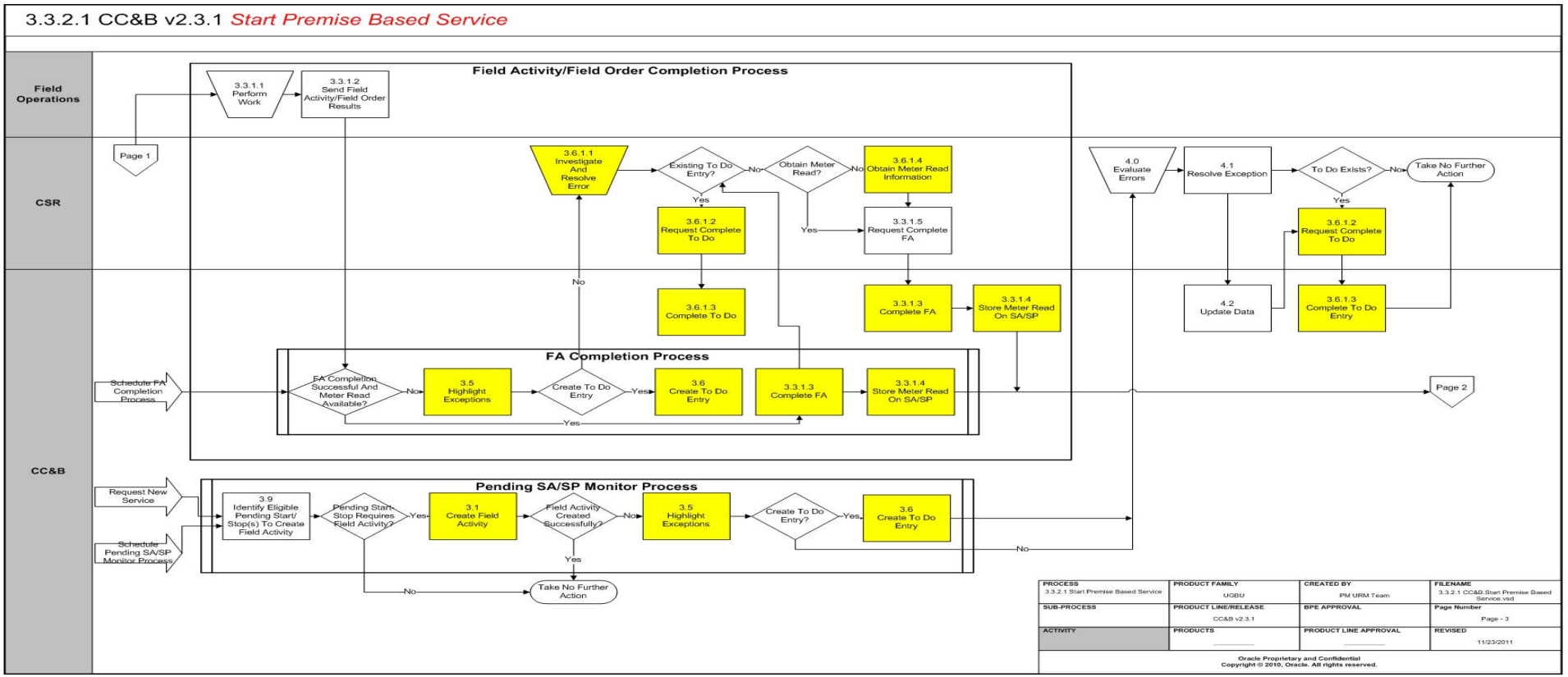
Start Premise Based Service Page 1



Start Premise Based Service Page 2



Start Premise Based Service Page 3



Start Premise Based Service Description

This section includes detailed descriptions of the steps involved in the Start Premise Based Service business process, including:

- **1.0 Search for Premise**
- **1.1 5.1.5.1 Manage Metered Site**
- **1.2 Search for Customer**
- **1.3 3.3.1.1 Establish Person and/or Account Process**
- **1.4 Analyze Pending Starts**
- **1.5 Update SA Information**
- **1.6 Update SA Information**
- **1.7 3.3.6.2 Start Premise Based Service for Landlord-Tenant**
- **1.8 Evaluate Account**
- **1.9 Request Credit Review from External Credit Bureau**
- **2.0 Provide External Credit Score Information**
- **2.1 Receive Results from External Credit Bureau**
- **2.2 Evaluate Results from External Credit Bureau**
- **2.3 3.3.3.2 Determine Customer Deposit**
- **2.4 3.3.2.3 Stop Premise Based Service**
- **2.5 Determine Specific Requirements for Each Start SA**
- **2.6 Confirm Start Service Information and Mailing Address**
- **2.7 Enter Changes**
- **2.8 Store Future Mailing Address**
- **2.9 Add Pending Start SA and Link SA/SP Group: Create SA**
- **3.0 Add Pending Start Alert. Group: Add Pending Start Alert**
- **3.1 Create Field Activity Group: Pending SA/SP Monitor Process**
- **3.2 3.3.2.2 Start Non-Premise Based Service**
- **3.3 5.3.2.1 Manage Field Activities and Field Orders**
- **3.4 Evaluate Pending Service Start Agreement**
- **3.4 Evaluate Pending Service Start Agreement**
- **3.4.1.1 Initiate Cancel for Pending Start**
- **3.4.1.2 Cancel Pending Start**
- **3.4.1.3 Request Add Customer Contact**
- **3.4.2.1 Update SA/SP with Read**
- **3.4.2.2 Request Activate SA**
- **3.4.2.3 Update SA and Change Status to Active Group: Service Agreement Activation Process**
- **3.4.2.4 Add Customer Contact Group: Service Agreement Activation Process**
- **3.5 Highlight Exceptions**

- **3.6 Create To Do Entry**
- **3.6.1.1 Investigate and Resolve Error Group: Field Activity /Field Order Completion Process**
- **3.6.1.2 Request Complete To Do Group: Field Activity /Field Order Completion Process**
- **3.6.1.3 Complete To Do Entry Group: Field Activity /Field Order Completion Process**
- **3.6.1.4 Obtain Meter Read Information**
- **3.7 Analyze Active SA**
- **3.8 Evaluate Cancellation**
- **3.8.1.1 4.2.2.2 Manage Meter Charges and 4.3.1.1 Manage Payments**
- **3.8.1.2 Initiate Cancel SA**
- **3.8.1.3 Cancel SA**
- **3.8.2.1 3.3.2.3 Stop Premise Based Service**
- **3.3.1.1 Perform Work Group: Field Activity /Field Order Completion Process**
- **3.3.1.2 Send Field Activity/Field Order/ Results Group: Field Activity /Field Order Completion Process**
- **3.3.1.3 Complete FA**
- **3.3.1.4 Store Meter Read on SA/SP Group: Field Activity /Field Order Completion Process**
- **3.3.1.5 Request Complete FA Group: Field Activity /Field Order Completion Process**
- **3.9 Identify Eligible Pending Start/Stop(s) to Create Field Activity Group: Pending SA/SP Monitor Process**
- **4.0 Evaluate Errors**
- **4.1 Resolve Exception**
- **4.2 Update Data**

1.0 Search for Premise

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the premise address in CC&B using Control Central Search The CSR or Authorized User first determines the address is in the service territory. If not, the CSR or Authorized User refers the caller to appropriate agency and process stops with no further action.

Entities to Configure
Installation Options-Framework, Algorithms, System Event: Premise Information
Installation Options-Framework, Algorithms, System Event: Control Central Alert
Zones

Business Objects	Available Algorithms
C1-UserDisplayAllPremises - User - Display All Premises	ADCTSTPO - Address 1, City, State, Postal C1_LSSL-DF - Highlight Premise Life Support/Sensitive Load CCAL-DECL - Highlight Effective Declarations for Acct and Prem CCAL-WF -Account or Premise linked to Active WF Process CCAL WFPREMR - Display active WF for premise based on char CCAL WFPREMX - Display active WF for premise based on context F1-SYNRQALRT -Retrieve Outstanding Sync Request

1.1 5.1.5.1 Manage Metered Site

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If the Premise is not in the service territory, the CSR or Authorized User refers the caller to appropriate agency and the process stops with no further actions. If the Premise or Service Point(s) need to be created refer to 5.1.5.1 Manage Metered Site.

1.2 Search for Customer

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the customer in CC&B using Control Central Search. When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central - Account Information refreshed with the selected customer's data. Dashboard Alerts provide the CSR or Authorized User with pertinent information for the customer including Pending Starts.

Entities to Configure
Zones
Installation Options
Installation Options-Framework
Identifier Type
Geographic Type

Available Algorithms
CI_PERS-LF - Main name (alternate name)
PERS-INFO-LF - Main name (alternate name) - phone number
CI_ACI-STD - Common Account Information
PHN-FMT-UK -United Kingdom phone format
PHN-FMT-US - North American phone format
C1_PENDST-DF - Highlight Pending Start Service Agreements
CCAL-DECL - Highlight Effective Declarations for Acct and Prem
CCAL-WF - Account or Premise linked to Active WF Process
CCAL WFACCTR - Display active WF for account based on char
C1_CASH-DF - Cash Only Account
C1_LSSL-DF - Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF - Highlight Life Support/Sensitive Load on Premise
CI_STOPSA-DF - Highlight Stopped SAs
CI_GLBL-CTXT - Global Context

1.3 3.3.1.1 Establish Person and/or Account Process

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: Refer to process 3.3.1.1 Establish Person and/or Account Process.

1.4 Analyze Pending Starts

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the existing Pending Start to determine if updates are required.

1.5 Update SA Information

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: A start date or other Service Agreement information may need to be changed. The CSR or Authorized User enters the changes.

1.6 Update SA Information

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Any updates for the Service Agreement are made in CC&B.

Entities to Configure
Installation Options-Framework
SA Type
SA Type SA Rel Type
SA Relationship Type

Business Objects	Available Algorithms
ServiceAgreement - ServiceAgreement	CI_SAI-STD - Common SA Information
DR_ServiceAgreement - Data Replicator - SA	SWITCH SERV - Create SP and SA (and stop prior if back-to-back)
C1-SABasic - Service Agreement Basic	CI_SAT-NOBAL - Basic Description (No Balance)
CI_DepositSAAmount - Maintain Deposit SA Amount	CI_SAT-NRT - Basic Description (No Rate)
CI_SAInfo - SA Information	SACR-AT - Activate service agreement
SARelationship - Service Agreement Relationship	
CI_SATypeStartOptionRequireds - SA Type Start Option Required	

1.7 3.3.6.2 Start Premise Based Service for Landlord-Tenant

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: Refer to 3.3.6.2 Start Premise Based Service for Landlord-Tenant.

1.8 Evaluate Account

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User evaluates the account. Typically Account Financial History, Billing History, and Account Credit and Collection History are reviewed.

1.9 Request Credit Review from External Credit Bureau

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User determines further information is needed and performs an external credit check. An external review is conducted. CC&B has functionality to

interface with Credit Agencies. This is a complete custom process. The information is returned to CC&B.

2.0 Provide External Credit Score Information

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: External Credit Bureau

Description: The External Credit Bureau collects and provides the required external credit score information.

Customizable Process
Credit Bureau Interface - 100% Custom Process

2.1 Receive Results from External Credit Bureau

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User receives the credit information from the External Credit Bureau. This is a complete custom process.

Customizable Process
Credit Bureau Interface - 100% Custom Process

2.2 Evaluate Results from External Credit Bureau

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules the CSR or Authorized User reviews the credit information to determine the overall credit risk for the Company.

2.3 3.3.3.2 Determine Customer Deposit

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: A Customer Deposit may be required. Refer to 3.3.3.2 Determine Customer Deposit .

2.4 3.3.2.3 Stop Premise Based Service

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: There may be Active SA's. Refer to 3.3.2.3 Stop Premise Based Service

2.5 Determine Specific Requirements for Each Start SA

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User gathers information to initiate the Start Service process. Start Service can be the result of backdating or reconnection due to a previous cut for non-pay. The CSR or Authorized User selects the Premise and determines the Service Points to start. The CSR or Authorized User determines the SA Type, Start Option, SIC or Budget information. Start options may include Connection fees, Characteristics for specific charges, Contract riders, Contract Terms, or Rate determination. The Service Agreement Type can default based on Service Point Type.

Entities to Configure
SA Type
SA Type Start Options
SP Type
Rate Schedule
Contract Quantity Type
Contract Options Type
Contract Option Event Type
To Do Type
To Do Role
Adjustment Type
Currency
Billable Charge Template
Bill Factor
Characteristic Type
Interval Profile Rel type
TOU Map Relationship Type
TOU Group
Terms and Conditions

Business Objects	Available Algorithms
ServiceAgreement - ServiceAgreement DR_ServiceAgreement - Data Replicator - SA C1-SABasic - Service Agreement Basic CI_DepositSAAmount - Maintain Deposit SA Amount CI_SAInfo - SA Information SARelationship - Service Agreement Relationship CI_SATypeStartOptionRequireds - SA Type Start Option Required	SA Type CI_SAT-NOBAL - These algorithms are for display of Service Agreement Information in CC&B CI_SAT-NRT - Installation Options Service Agreement Information Display, C1-SA-INFO - Installation Options Service Agreement Information Display SACR-WP - Create a Workflow Process for SA Created NEWSA To Do - Create To Do Entry when SA added, SACR-AT - Activate SA

2.6 Confirm Start Service Information and Mailing Address

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is dialogue with the Customer. Start Information is confirmed including mailing address.

2.7 Enter Changes

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters new mailing address or other information. The system defaults to mailing premise. The CSR or Authorized User can change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is activated.

Entities to Configure
Postal Code Default
Installation Options
Bill Route Type
Country

2.8 Store Future Mailing Address

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The mailing address information is stored until the Service Agreement is activated.

2.9 Add Pending Start SA and Link SA/SP Group: Create SA

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B creates a Service Agreement in Pending Start status. Through Start Service Initiation CC&B creates a Service Agreement in pending status and links Service Point information to the Service Agreement.

Entities to Configure
To Do Type
To Do Role
SA Type

Available Algorithm(s)
New SA To Do - Create a To Do entry when a SA is added
SACR-AT - This SA creation algorithm activates a pending start SA.

3.0 Add Pending Start Alert. Group: Add Pending Start Alert

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B creates a Dashboard Alert for the Pending Start Service Agreement.

Entities to Configure
Installation Options

Available Algorithm(s)
C1_PENDST-DF - Highlight Pending Start SA's
Installation Options - Control Central Alert Algorithms

3.1 Create Field Activity Group: Pending SA/SP Monitor Process

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: A start Field Activity may be created if configured and is required. CC&B links the Start Field Activity to the SA/SP. The Pending SA/SP Monitor Process also creates Field Activities for Pending Starts and Stops if the Field Activity is not already created and is required.

Manual Process: A Field Activity may be created when the CSR or Authorized User initiates the Start Service.

Automated Process: A Field Activity may be created when the Pending SA/SP Monitor Process is executed.

Process Configurable
Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.

Entities to Configure
To Do Type
To Do Role

3.2 3.3.2.2 Start Non-Premise Based Service

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: Refer to 3.3.2.2 Start Non-Premise Based Service.

3.3 5.3.2.1 Manage Field Activities and Field Orders

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

Available Algorithm(s)
SA Type - SASP FW Creation - Create Field Activity - Check for Meter Read and Back to Back
Installation Options FAIN - Field Activity Information
FAAD INFO - Field Activity Additional Information
DFLT DGRP algorithm - FA Type Dispatch Group Criteria -
Field Activity Type - C1-FACCHARGE - Field Activity Completion - this algorithm applies charges by creating an adjustment
FACMPL-FLATC - this algorithm levies a flat charge

Entities to Configure
FA Types
FA Type Profiles
Operations Area
Dispatch Group
Field Service Class
Field Service Control

Configurable Processes
Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.
FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
FA Completion - FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.
SASP - The find read for SA/SP process updates SA/SP records of active service agreements with the appropriate start or stop read

3.4 Evaluate Pending Service Start Agreement

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the pending start Service Agreement. Prior to Service Agreement activation, it may be determined the Service Agreement needs to be canceled. The Customer may call and indicate they are not moving in to the given Premise. They may request to cancel the request to start.

3.4.1.1 Initiate Cancel for Pending Start

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User cancels the Pending Start Service Agreement.

3.4.1.2 Cancel Pending Start

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Start Service Agreement transaction is removed from CC&B. Any Pending Reciprocal Stop may also be removed.

3.4.1.3 Request Add Customer Contact

See **Start Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Subject to established business rules, the CSR or Authorized User creates a Customer Contact for the customer, recording pertinent information about the change(s) to the Service Agreement. Refer to process 3.4.1.1 Manage Customer Contacts.

Entities to Configure
Customer Contact Class
Customer Contact Type

3.4.2.1 Update SA/SP with Read

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the start date and updates the Service Agreement/Service Point Link with an associated Meter Read for the effective start date. Please refer to section 4.2.1.1a Read Meter for further details.

3.4.2.2 Request Activate SA

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User manually activates the Service Agreement in CC&B.

3.4.2.3 Update SA and Change Status to Active Group: Service Agreement Activation Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Agreement status is transitioned to active in CC&B.

Manual Process: The CSR or Authorized User may transition the Service Agreement to Active as a result of exception processing.

Automated Process: CC&B will automatically transition the Service Agreement to Active status when all required information is made available.

Configurable Processes
SAACT - SA Activation - activates and stops Service Agreements when all required information is available.

3.4.2.4 Add Customer Contact Group: Service Agreement Activation Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Customer Contact is added in CC&B. If configured, CC&B can automatically create a Customer Contact when Service Agreements are activated.CC&B creates a Dashboard Alert for the Customer Contact information and displays the last contact in the Dashboard Alert.

Manual Process: - The CSR or Authorized User can create a Customer Contact online based on established business rules.

Automated Process: - Based on configuration a Customer Contact can be created automatically.

Entities to Configure
SA Type
Installation Options
Customer Contact Class
Customer Contact Type

Available Algorithm(s)
SAAT-CC - SA Type -SA Activation - this algorithm creates a Customer Contact
SACR-AT - Activate service agreement

Configurable Processes
SAACT - SA Activation - activates and stops Service Agreements when all required information is available.

3.5 Highlight Exceptions

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Service Agreement Activation Process

Group: Field Activity /Field Order Completion Process

Group: Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: The background process, SAACT, Service Agreement Activation, periodically checks to see if Service Agreements can be activated. CC&B creates an exception processing record for each Service Agreement with the Service Agreement's effective start date less than the current business date and with missing or incomplete information. The Service Agreement may also be manually activated. A separate background process creates To Do Entries for Pending Start/Stops that are older than a configured date. To Do Type and To Do Roles must also be configured.

Entities to Configure
To Do Types
To Do Roles

Configurable Processes
SAACT - SA Activation - activates and stops Service Agreements when all required information is available.
TD-SSFTL To Do for Old Pending Start/ Stops-catches start/stop requests that have gone unfulfilled.

3.6 Create To Do Entry

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Service Agreement Activation Process

Group: Field Activity /Field Order Completion Process

Group: Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: If configured, this background process creates To Do Entries for exception processing. The exception is also available for viewing and resolution on a separate page in CC&B.

Entities to Configure
To Do Types
To Do Roles

Configurable Processes
TD-FAUPL - This background process creates a To Do entry for every field activity upload staging record that's in error.
SAACT - SA Activation - activates and stops Service Agreements when all required information is available.
TD-SSFTL To Do for Old Pending Start/ Stops-catches start/stop requests that have gone unfulfilled.

3.6.1.1 Investigate and Resolve Error Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for the missing or incomplete information related to Service Agreement Activation or Field Activity Completion. The CSR or Authorized User enters this information in CC&B.

3.6.1.2 Request Complete To Do Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If the background process creates a To Do Entry, the CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry once the error is resolved. The CSR or Authorized User may add comments or a log entry for future reference.

Entities to Configure
To Do Types
To Do Roles

3.6.1.3 Complete To Do Entry Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The To Do Entry is updated to Complete status in CC&B.

Entities to Configure
To Do Types
To Do Roles

3.6.1.4 Obtain Meter Read Information

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: The read may not be readily available. The CSR or Authorized User manually enters available information in CC&B. This may require creation of a new Field Activity, estimated read, or further investigation to provide necessary read information.

3.7 Analyze Active SA

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User may review the Active Service Agreement. Information becomes available that requires further evaluation. The Service Agreement may need to be canceled. The customer may call and indicate they are not moving in to the given Premise. The customer may request to cancel the original request after the Service Agreement is activated.

3.8 Evaluate Cancellation

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: As part of the cancellation process, the CSR or Authorized User determines if any financial transactions are associated with the Active Service Agreement.

3.8.1.1 4.2.2.2 Manage Meter Charges and 4.3.1.1 Manage Payments

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Subject to established business rules, the CSR or Authorized User cancels the existing Financial Transactions. An applicable Cancel Reason is selected. Refer to 4.2.2.2 Manage Meter Charges and 4.3.1.1 Manage Payments.

Entities to Configure
Cancel Reason- for Bill, Payment or Adjustment

3.8.1.2 Initiate Cancel SA

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User changes the Service Agreement status to Canceled.

3.8.1.3 Cancel SA

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Agreement is transitioned to a canceled status. Canceled is a final status. If configured, a To Do entry can be created when a Service Agreement is canceled.

Entities to Configure
Cancel Reason- for Bill, Payment or Adjustment

Available Algorithm(s)
SACA CRTODO - Create To Do Entry when SA Canceled

3.8.2.1 3.3.2.3 Stop Premise Based Service

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: If configured, this background process creates To Do Entries for exception processing. The exception is also available for viewing and resolution on a separate page in CC&B.

Entities to Configure
To Do Types
To Do Roles

3.3.1.1 Perform Work Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: A technician is dispatched to the field to obtain read, and/or connect, or perform other tasks. This represents a combined set of processes that includes dispatching, performing the work, recording of a read or other activity at the site, and uploading results.

3.3.1.2 Send Field Activity/Field Order/ Results Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The Field Operations office communicates and returns the Field Activity/Field Order results. Refer to 5.3.2.1 Manage Field Activities and Field Orders, 4.2.1.1a Read Meters and 4.2.1.2a Load Meter Reads.

Configurable Processes
Process for Populating MR Upload Staging and FA Upload Staging are custom. MUP1 and MUP2 reference the background processes for populating the meter configuration and creating the meter read

3.3.1.3 Complete FA

See **Start Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Field Activity Completion

Group: Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

Entities to Configure
FA Types
FA Type Profiles
Operations Area
Dispatch Group
Field Service Class
Field Service Control

Available Algorithm(s)
SA Type - SASP FW Creation - Create Field Activity - Check for Meter Read and Back to Back
Installation Options FAIN - Field Activity Information
FAAD INFO - Field Activity Additional Information
DFLT DGRP algorithm - FA Type Dispatch Group Criteria -
Field Activity Type - C1-FACCHARGE - Field Activity Completion - this algorithm applies charges by creating an adjustment
FACMPL-FLATC - this algorithm levies a flat charge

Configurable Processes
Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.
FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
FA Completion - FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.
SASP - The find read for SA/SP process updates SA/SP records of active service agreements with the appropriate start or stop read

3.3.1.4 Store Meter Read on SA/SP Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 3** on page 2-4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The meter read associated with the Start Service Agreement is stored in CC&B and available for the background process, Service Agreement Activation, to activate the Service Agreement. This read is now linked to the SA/SP.

Manual Process: The CSR or Authorized User uses this meter read information entered to manually complete the Field Activity.

Automated Process: CC&B links the read to the Service Point associated with the newly activated Service Agreement.

3.3.1.5 Request Complete FA Group: Field Activity /Field Order Completion Process

See **Start Premise Based Service Page 3** on page 2-4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User manually completes the Field Activity using the meter read information.

3.9 Identify Eligible Pending Start/Stop(s) to Create Field Activity Group: Pending SA/SP Monitor Process

See **Start Premise Based Service Page 3** on page 2-4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending SA/SP Monitor Process selects and creates Field Activities for Pending Starts and Stops if the Field Activity is not already created and is required.

Configurable Processes
Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.

4.0 Evaluate Errors

See **Start Premise Based Service Page 3** on page 2-4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for missing or incomplete information.

4.1 Resolve Exception

See **Start Premise Based Service Page 3** on page 2-4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters required information in CC&B to resolve the exception. This may include creating a Field Activity, or updating a Meter record, Service Point record, or SP Meter/Item History records.

4.2 Update Data

See **Start Premise Based Service Page 3** on page 2-4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Any resolution or change information is updated in CC&B.

Installation Options - Control Central Alert Algorithms

PP-Active	Show Count of Active Pay Plans
PP-Broken	Show Count of Broken Pay Plans
PP-Kept	Show Count of Kept Pay Plans
CC-PPDENIAL	Count Pay Plan Denial Customer Contacts
CCAL WFACCTX	Display Active WF for Account Based on Context
CCAL WFPREMX	Display Active WF for Premise Based on Context
CCAL WFACCTR	Display active WF for account based on char
CCAL WFPREMR	Display active WF for premise based on char
CCAL-TD	Highlight Outstanding To Do Entries
CCAL-DECL	Highlight Effective Declarations for Account and Premise
CCAL-CASE	Highlight Open Cases
CCAL-FAERMSG	Highlight FA's with outstanding outgoing messages
CI_WO_BILL	Highlight Written off Bills
CI_OD-PROC	Highlight Active Overdue Processes
CI_OMF_DF	Highlight Open and Disputed Match Even
CI_STOPSA-DF	Highlight Stopped SA's
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-DF	Highlight Active Collection Processes
C1_COLLRF-DF	Highlight Active Collection Agency Referral
C1_PENDST-DF	Highlight Pending Start Service Agreements
C1_CASH-DF	Cash Only Account
C1_CRRT-DF	Credit Rating Alert
C1_LSSL-DF	Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF	Highlight Life Support/Sensitive Load on Premise
C1_SEVPR-DF	Highlight Active Severance Processes
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
F1-SYNRQALRT	Retrieve Outstanding Sync Request

Related Training

The following User Productivity Kit modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities User Productivity Kit for Customer Care and Billing, Rating and Billing
- Oracle Utilities User Productivity Kit for Customer Care and Billing, Rating and Billing for Interval Data