Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

3.3.2.3 Stop Premise Based Service

July 2012

ORACLE

Oracle Utilities Customer Care and Billing Utility Reference Model 3.3.2.3, Release 2.3.1

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Chapter 1

Overview

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

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

Brief Description

Business Process: 3.3.2.3 Stop Premise Based Service

Process Type: Sub Process

Parent Process: 3.3.2 Manage Service Agreement

Sibling Processes: 5.3.2 Manage Fieldwork (CCB), 3.3.3.1 Refund Deposit, 3.4.4.3a Cancel Budget, 3.4.4.3b Expire Non-Billed Budget, 4.2.2.2 Manage Meter Charges, 4.3.1.1 Manage Payments, 3.4.1.1 Manage Customer Contacts, 4.3.2.1 Manage Collection Process, 4.3.2.2 Manage Severance Process, 3.3.2.1 Start Premise Based Service, 3.3.2.2 Start Non-Premise Based Service, 3.3.2.4 Stop Non-Premise Based Service, 3.3.6.3 Stop Premise Based Service for Landlord-Tenant, 5.3.2.1 Manage Field Activities and Field Orders

This process describes the typical Stop Service processing. In the Stop Service process the relationship between the Service Provider and Customer is terminated. There is an effective end date and end read for the Service Agreement.

This request for Stop Service could be for:

- Start Service for a new or existing customer and a Stop Service are created automatically by the system. See Sibling Process 3.3.2.1 Start Premise Based Service.
- Customer no longer receives service from the Service Provider.

Actors/Roles

The Stop 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

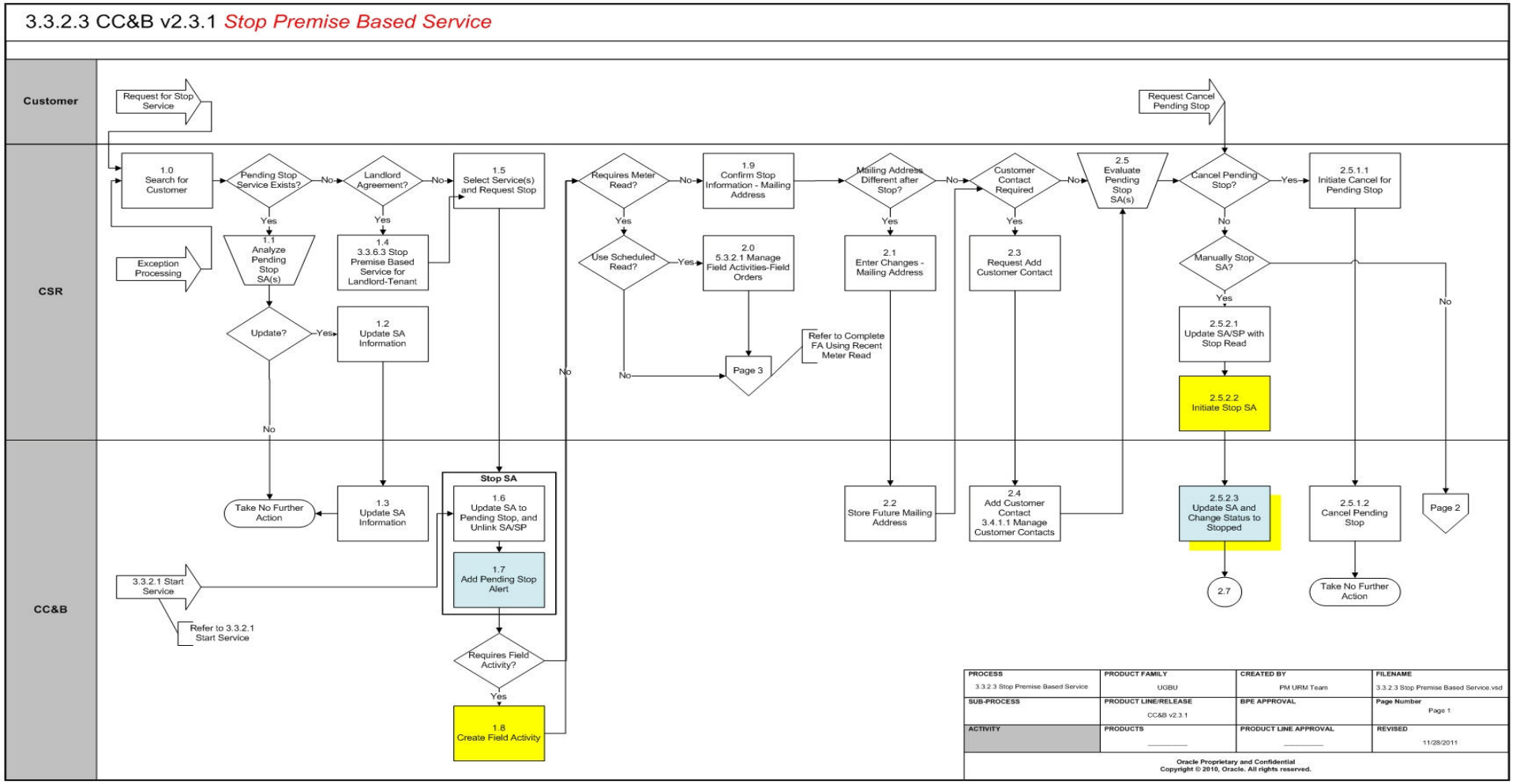
Detailed Business Process Model Description

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

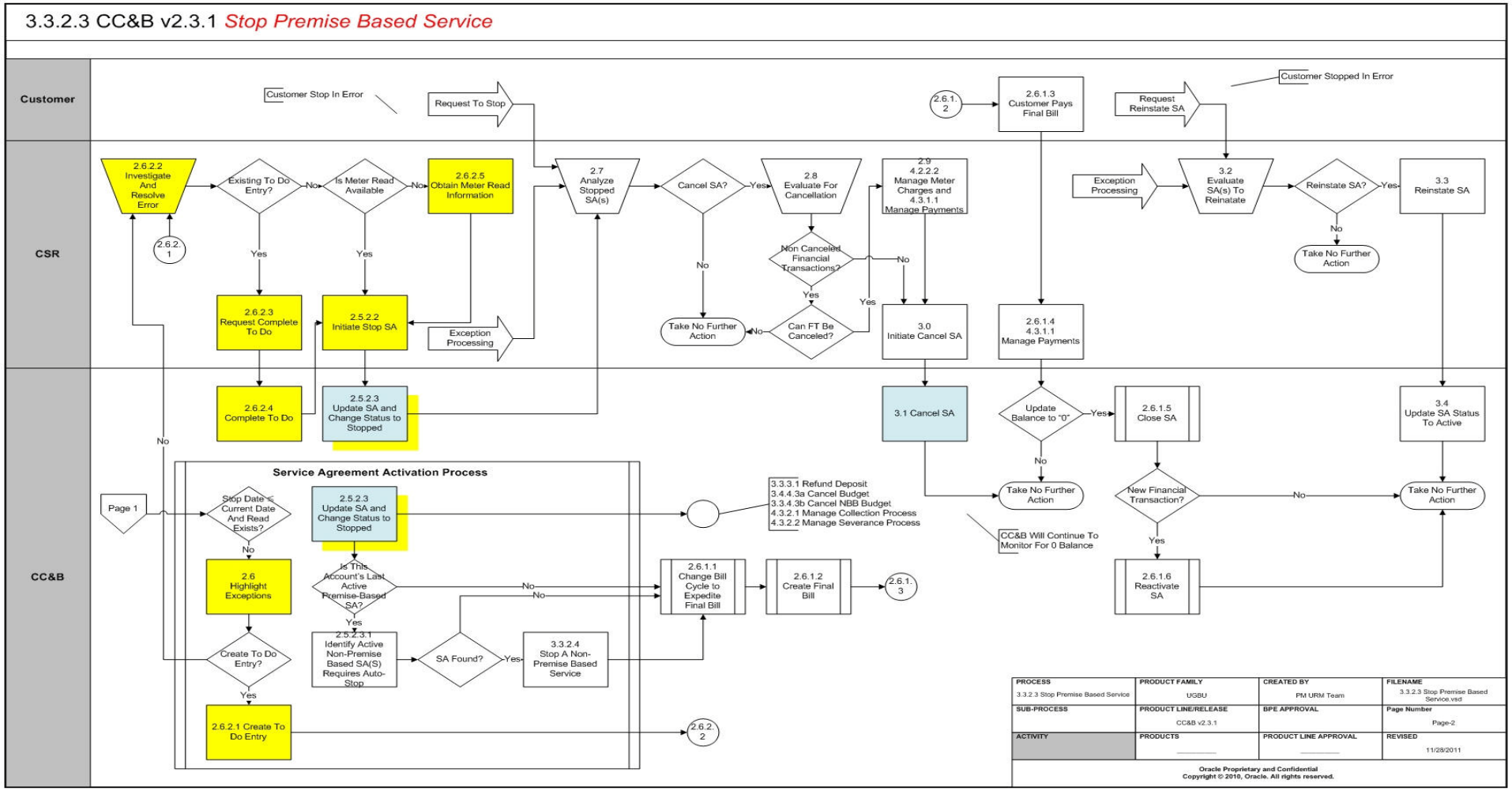
- **Business Process Diagrams**
  - **Stop Premise Based Service Page 1**
  - **Stop Premise Based Service Page 2**
  - **Stop Premise Based Service Page 3**
- **Stop Premise Based Service Description**
- **Installation Options - Control Central Alert Algorithms**
- **Related Training**

Business Process Diagrams

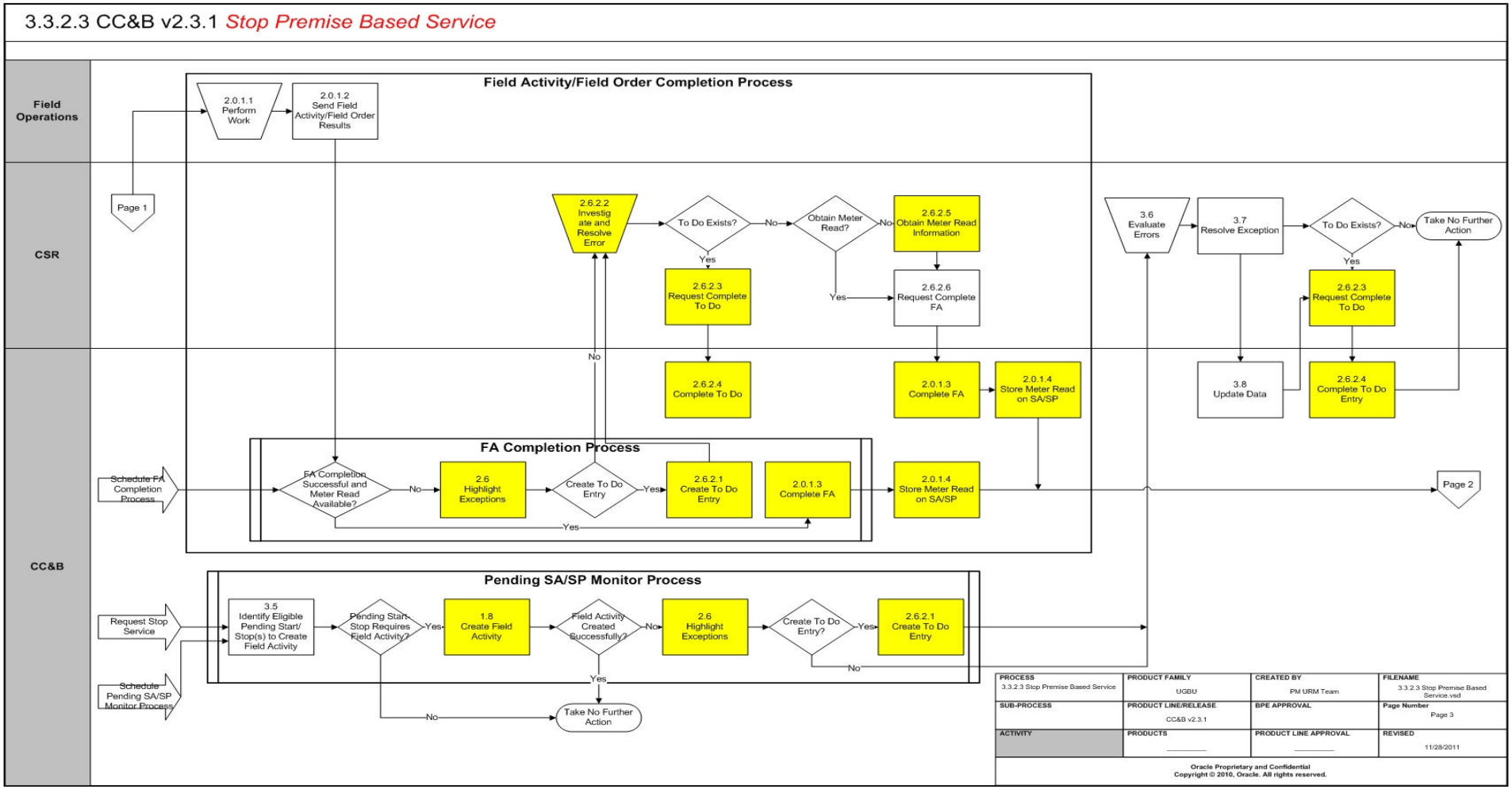
Stop Premise Based Service Page 1



Stop Premise Based Service Page 2



Stop Premise Based Service Page 3



Stop Premise Based Service Description

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

- **1.0 Search for Customer**
- **1.1 Analyze Pending Stop SA(s)**
- **1.2 Update SA Stop Information**
- **1.3 Update SA Information**
- **1.4 3.3.6.3 Stop Premise Based Service for Landlord-Tenant**
- **1.5 Select Service(s) and Request Stop**
- **1.6 Update SA to Pending Stop and Unlink SA/SP**
- **1.7 Add Pending Stop Alert**
- **1.8 Create Field Activity**
- **1.9 Confirm Stop Information -Mailing Address**
- **2.0 5.3.2.1 Manage Field Activities and Field Orders**
- **2.1 Enter Changes - Mailing Address**
- **2.2 Store Future Mailing Address**
- **2.3 Request Add Customer Contact**
- **2.4 Add Customer Contact**
- **2.5 Evaluate Pending Stop SA(s)**
- **2.5.1.1 Initiate Cancel for Pending Stop**
- **2.5.1.2 Cancel Pending Stop**
- **2.5.2.1 Update SA/SP with Read**
- **2.5.2.1 Update SA/SP with Read**
- **2.5.2.2 Initiate Stop SA**
- **2.5.2.3 Update SA and Change Status to Stopped**
- **2.5.2.3.1 Check for Active Non-Premise based SA(s) with Auto-Stop flag**
- **2.6 Highlight Exceptions**
- **2.6.1.1 Change Bill Cycle to Expedite Final Bill**
- **2.6.1.2 Create Final Bill**
- **2.6.1.3 Customer Pays Final Bill**
- **2.6.1.4 4.3.1.1 Manage Payments**
- **2.6.1.5 Close SA**
- **2.6.1.6 Reactivate SA**
- **2.6.2.1 Create To Do Entry**
- **2.6.2.2 Investigate and Resolve Error**
- **2.6.2.3 Request Complete To Do**
- **2.6.2.4 Complete To Do Entry**
- **2.6.2.5 Obtain Meter Read Information**

- **2.7 Analyze Stopped SA**
- **2.8 Evaluate for Cancellation**
- **2.9 4.2.2.2 Manage Meter Charges and 4.3.1.1 Manage Payments**
- **3.0 Initiate Cancel SA**
- **3.1 Cancel SA**
- **3.2 Evaluate SA to Reinstate**
- **3.3 Reinstate SA**
- **3.4 Update SA Status to Active**
- **2.0.1.1 Perform Work**
- **2.0.1.2 Send Field Activity/Field Order Results**
- **2.0.1.3 Complete FA**
- **2.0.1.4 Store Meter Read on SA/SP Link**
- **2.0.1.5 Request Complete FA**
- **3.9 Identify Eligible Pending Start/Stop(s) to Create Field Activity**
- **3.6 Evaluate Errors**
- **3.7 Resolve Exception**
- **3.8 Update Data**

1.0 Search for Customer

See **Stop 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 Stops.

Entities to Configure
Installation Options
Zones

Available Algorithms
Installation Options - Control Central Alerts
Installation Options - Person Information - PERS-INFO-LF; Installation Options
NMFM-VALFMT - Person Name Validation

1.1 Analyze Pending Stop SA(s)

See **Stop 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 analyzes the existing Pending Stop Service Agreement to ensure all information is received from customer and confirms stop date.

1.2 Update SA Stop Information

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

Actor/Role: CSR

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

1.3 Update SA Information

See **Stop 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

Business Object	Available Algorithms
ServiceAgreement - ServiceAgreement C1-SABasic - Service Agreement Basic CI_SAInfo - SA Information SARelationship - Service Agreement Relationship CI_SATypeStartOptionRequireds - SA Type Start Option Required	Installation Options - SA Information Algorithms SA Information - C1-SAI-INFO

1.4 3.3.6.3 Stop Premise Based Service for Landlord-Tenant

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

Actor/Role: CSR

Description: Refer to Process 3.3.6.3 Stop Premise Based Service for Landlord-Tenant.

1.5 Select Service(s) and Request Stop

See **Stop 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 selects Service Agreements to stop.

The CSR or Authorized User is presented with the following choices:

- Stop Selected SA's - To Stop selected Service Agreements linked to the Account
- Stop a Premise To Stop All Services at the Premise (Address)
- Stop a SA - To Stop a specific SA
- Stop all Active SA's - To Stop All service agreements linked to the Account

Entities to Configure
Installation Options; SA Type

Available Algorithms
Installation Options - SA Information Algorithms; SA Type - SA Information Algorithms; SA Type - Initiate Stop SA Algorithms
Installation Options - C1-SA-INFO, SA Type- C1-SAT-INFO. These are algorithms for display of Service Agreement information in CC&B.
LLREV - Landlord Revision
SAIS-ST - This algorithm automatically stop a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

1.6 Update SA to Pending Stop and Unlink SA/SP

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

Group: Stop SA

Actor/Role: CC&B

Description: The status of the Service Agreement changes to Pending Stop. The SA/SP link is populated with an effective end date (stop) date. A Field Activity may be created if configured. CC&B links the Field Activity to the SA/SP.

1.7 Add Pending Stop Alert

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

Group: Add Pending Stop Alert

Actor/Role: CC&B

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

Entities to Configure
Installation Options

Available Algorithms
Installation Options Control Central Alert Algorithms

1.8 Create Field Activity

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

Group: Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: A stop Field Activity may be created if configured and is required. CC&B links the Stop 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 Stop Service.

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

Entities to Configure
To Do Type; To Do Role; SA Type; FA Type; FA Type Profile

Available Algorithms
Installation Options Control Central Alert Algorithms;
SA Type Start Stop Field Work: SASP FW CRE - Use FA type profile-check for MR and back-to-back; CI_SASP-INMR - SA/SP Interval Meter Read Creation

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

1.9 Confirm Stop Information -Mailing Address

See **Stop 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 confirms the mailing address for the final bill or if the address is changing for future bills for remaining active service agreements.

2.0 5.3.2.1 Manage Field Activities and Field Orders

See **Stop 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 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 Algorithms
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 -
FACMPL-FLATC - this algorithm levies a flat charge

Customizable 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

2.1 Enter Changes - Mailing Address

See **Stop 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 enters new information including a forwarding address. The system defaults to mailing premise. The CSR may change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is stopped.

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

2.2 Store Future Mailing Address

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

Actor/Role: CC&B

Description: The new mailing address is stored in CC&B and is updated when the Service Agreement is stopped.

2.3 Request Add Customer Contact

See **Stop 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 creates a Customer Contact for the customer, recording pertinent information about the change(s) for the Service Agreement.

Entities to Configure
Customer Contact Class
Customer Contact Type

2.4 Add Customer Contact

See **Stop 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 information is added in CC&B.

Entities to Configure
Customer Contact Class
Customer Contact Type

2.5 Evaluate Pending Stop SA(s)

See **Stop 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 reviews the pending stop Service Agreement. The customer may call to indicate they are not moving from the given premise. It is determined to cancel the Pending Stop.

2.5.1.1 Initiate Cancel for Pending Stop

See **Stop 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 cancels the Pending Stop Service Agreement.

2.5.1.2 Cancel Pending Stop

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

Actor/Role: CC&B

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

2.5.2.1 Update SA/SP with Read

See **Stop 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 stop date and updates the Service Agreement/Service Point Link with an associated Meter Read for the effective stop date.

2.5.2.2 Initiate Stop SA

See **Stop 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 stops the Service Agreement in CC&B.

2.5.2.3 Update SA and Change Status to Stopped

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

Actor/Role: CC&B

Description: When all necessary information is available, CC&B transitions the Service Agreement to stopped.

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

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

Entities to Configure
SA Type

Available Algorithms
LLREV - Landlord Revision
SAST-NB - execute additional logic that should be executed when a non-billed budget SA is stopped.
SAST-RF - This SA Type Stop algorithm refunds a service credit membership fee.
SAIS-ST - This algorithm automatically stops a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

Customizable Processes
SAACT - SA Activation The service agreement activation process updates pending start and pending stop service agreements.

2.5.2.3.1 Check for Active Non-Premise based SA(s) with Auto-Stop flag

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

Actor/Role: CC&B

Description: If the SA is the account's last active premise-based service, CC&B proceeds to stop account's remaining active non-premise based service(s) configured with auto-stop indicator. Refer to 3.3.2.4 Stop Non-Premise Based Service.doc.

Entities to Configure
SA Type

Customizable Processes
SAACT - SA Activation The service agreement activation process updates pending start and pending stop service agreements.

2.6 Highlight Exceptions

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

Group: Service Agreement Activation Process

Group: FA Completion Process

Group: Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: The CC&B background process, 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.

Entities to Configure
To Do Type
To Do Role

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

2.6.1.1 Change Bill Cycle to Expedite Final Bill

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

Actor/Role: CC&B

Description: CC&B changes the bill cycle when the last service agreement for the account is stopped to allow for final bill creation.

2.6.1.2 Create Final Bill

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

Actor/Role: CC&B

Description: The Batch Billing process creates the final bill for the Customer.

Entities to Configure
Bill Cycle, Bill Segment Type, Customer Class, Installation Options - Billing, SA Type

Available Algorithm(s)
Bill Segment Create Algorithms: BSBS-BC-DFT, BSBS-BC-S, BSBS-BC-W, BSBS-BC-WS (Create bill segment using billable charges); BSBS-LO (Create bill segment for loan SA); BSBS-RA-DFT, BSBS-RB-DFT, BSBS-RT-DFT (Bill recurring charge)
Bill Segment FT Creation Algorithms: BSBF-B0-DFT (No Payoff! Payoff=0/Current Amt=Bill Amt-no GL), BSBF-BA-DFT (Payoff Amt=Bill Amt/Current Amt=Amt Due), BSBF-CU-DFT (Company Usage! Payoff=Current=0 (GL Affected), BCBF-LO (Payoff Amt=Interest/Current Amt=Principal

Available Algorithm(s)
Bill Segment Information Algorithm: CI_BST-NSAID - Basic Bill Segment Information-No SA Id
Customer Class Bill Eligibility Algorithm: CI_SKIPINACC - Skip Inactive Accounts
Customer Class Pre-Bill Completion Algorithms: C1_CPBC-TAXT Apply Taxation Threshold; CPBC-DB-PY Delete bill if only payment exists; CPBC-DMCH-E Apply De Minimis Rule
Customer Class Bill Completion Algorithms: CI-SUP-PR-BL Suppress Printing Bills After Final Bill; CI_CN-BRT Suppress Bill Routings for credit notes; CI_CN_RADJ Reverse Adjustments When Creating Credit Note; DELTAFFMILES, UNITEDMILES Add Delta/ United frequent flier miles
Customer Class Bill Segment Freeze/Cancel Algorithm: CI-BSFZ-BCH Cancel Bill Segment Billable Charges
Customer Class Post Bill Completion Algorithms: CI_CN-ADNB Recreate Adjustments for Next Bill; CI_CR-BLRVWS Create Bill Review Schedule; CI_MULTDUDT Additional Bill Due Dates
Customer Class FT Freeze Algorithms: CFTZ-VAT-GL (Create Excess Credit GL Details); CI_CFTZ_COFT (OI ONLY- Cancel OI FT, keep original match event); CI_PR-CA-RVS (Prevent Cash Accounting Reversal); CNCL FT MEVT (OI ONLY-Create a Match Event for canceled FTs)
Customer Class LPC Eligibility Rule Algorithm: LPE-DFLT Eligible if debt exceeds $5
SA Type FT Freeze Algorithms: CI_DEP-ARS-D Deposit SA FT Arrears Date Setup; STG PAY SPR Create FT Process for paying service provider; STG SND CONS Create FT process for sending consumption; UNIV PIF MSG Create 'Paid In Full' message when deposit paid
SA Type Pre-Bill Completion Algorithms: DEL BSGE E Delete electric bill segments in error; DEL BSEG G Delete gas bill segments in error; DEL BSEG W Delete water bill segments in error
SA Type Bill Completion Algorithms: BC-XFER A/R Transfer all FTs to service provider; BCMP-ESTBSM Add bill segment message if estimated read used; BCMP-TR-WBFT Transfer receivables to WBFT service provider; CREDIT-XFER Transfer credit balance to other SAs; NB-BCMP Bill Complete for non-billed budget

Customizable Processes
BILLING - The billing process creates bills for accounts with an "open" bill cycle.
ASSGNSBN - Assign sequential bill numbers if implementing sequential billing
C1-BNBAS - Assign bill document numbers if implementing document number billing

2.6.1.3 Customer Pays Final Bill

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

Actor/Role: Customer

Description: The Customer receives and pays the final bill.

2.6.1.4 4.3.1.1 Manage Payments

See **Stop 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 enters the payment in CC&B. Refer to 4.3.1.1 Manage Payments.

2.6.1.5 Close SA

See **Stop 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 automatically transitioned to Closed Status when the balance is" 0".

2.6.1.6 Reactivate SA

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

Actor/Role: CC&B

Description: The system moves the Service Agreement to Reactivated status if a Financial Transaction is created after a Service Agreement is closed. When the financial balance returns to" 0", the Service Agreement is closed again.

2.6.2.1 Create To Do Entry

See **Stop 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

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

2.6.2.2 Investigate and Resolve Error

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

2.6.2.3 Request Complete To Do

See **Stop 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: 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

2.6.2.4 Complete To Do Entry

See **Stop 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: CC&B

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

Entities to Configure
To Do Types
To Do Roles

2.6.2.5 Obtain Meter Read Information

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

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.

2.7 Analyze Stopped SA

See **Stop 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 Stopped Service Agreement. Information made available requires further evaluation. The Service Agreement may need to be canceled.

2.8 Evaluate for Cancellation

See **Stop 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 Stopped Service Agreement. Information made available requires further evaluation. The Service Agreement may need to be canceled.

2.9 4.2.2.2 Manage Meter Charges and 4.3.1.1 Manage Payments

See **Stop 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

3.0 Initiate Cancel SA

See **Stop 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 changes the Service Agreement status to Canceled.

3.1 Cancel SA

See **Stop Premise Based Service Page 3** on page 2-4 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.

Entities to Configure
To Do Type
To Do Role

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

3.2 Evaluate SA to Reinstate

See **Stop 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 reviews and gathers available information to reinstate SA.

3.3 Reinstate SA

See **Stop 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 initiates the Reinstate SA function.

3.4 Update SA Status to Active

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

Actor/Role: CC&B

Description: The Reinstate action in CC&B changes the status of the Service Agreement to Active. The Reinstate action can be used to reinstate a closed, reactivated, or stopped Service Agreement.

2.0.1.1 Perform Work

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

Group: Field Activity /Field Order Completion Process

Actor/Role: Field Operations

Description: A technician is routed to the field to obtain read, and/or connect, or 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.

2.0.1.2 Send Field Activity/Field Order Results

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

Group: Field Activity /Field Order Completion Process

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.

Customizable 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

2.0.1.3 Complete FA

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

Group: Field Activity Completion

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

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

Customizable 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

2.0.1.4 Store Meter Read on SA/SP Link

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

Group: Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: The meter read associated with the stop Service Agreement is stored in CC&B and available for the Background Process, Service Agreement Activation to stop the Service Agreement.

2.0.1.5 Request Complete FA

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

Group: Field Activity /Field Order Completion Process

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

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

Group: Pending SA/SP Monitor Process

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.

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

3.6 Evaluate Errors

See **Stop 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.

3.7 Resolve Exception

See **Stop 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 to resolve the exception in CC&B. This may include creating a Field Activity, or updating a Meter record, Service Point record, or SP Meter/Item History records.

3.8 Update Data

See **Stop 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 (UPK) 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