Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

3.4.4.1a Enroll in Budget

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Oracle Utilities Customer Care and Billing Utility Reference Model 3.4.4.1a, Release 2.3.1

Contents

Chapter 1

Overview

This chapter provides a brief description of the Enroll in Budget business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 3.4.4.1a Enroll In Budget

Process Type: Sub-process

Parent Process: 3.4.2. Develop Insight and Understanding

Sibling Processes: 3.4.4.2a Monitor and True Up Budget, 3.4.4.3a Cancel Budget, 4.2.2.10a Manage Budget Billing, 4.3.1.1a Process Budget Payments, 3.4.1.1 Manage Customer Contacts, 3.3.2.1 Start Premise Based Service

This process describes Enrollment to Budget Plan. A Budget Plan is a levelized payment plan used to spread out seasonal bill variations. It is a common practice for Organizations to offer their customers Budget Plans. A Service Agreement on a Budget has a fixed amount levied on a bill segment, regardless of actual utility charges. While overall the Account references a specific Budget Plan, each Service Agreement has an individual, unique Budget amount. The sum of an Account's Service Agreements' Budget amount is the Account's Budget amount.

Providing Budget Billing service is a complex process, and consists of several sub-processes. Together the processes represent the full lifecycle of Budget Plan functionality: Enrollment in Budget, Monitor and True Up Budget, Manage Budget Billing, Process Budget Payments, and Cancel a Budget.

The Budget Enrollment process allows the CSR or Authorized User to set up a Budget plan upon Customer request. The Customer's Account and Service Agreement(s) must satisfy established Business rules. As a part of enrollment in a Budget plan CC&B offers automatic Budget amount calculation. It supports negotiations with the Customer and simplifies the Budget enrollment process overall. Different Budget Plans may be used for various types of customers.

A Budget Plan may be set up for a Customer at time of Start Service, or at any time during the lifecycle of an active Service Agreement.

Actors/Roles

The Enroll in Budget 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

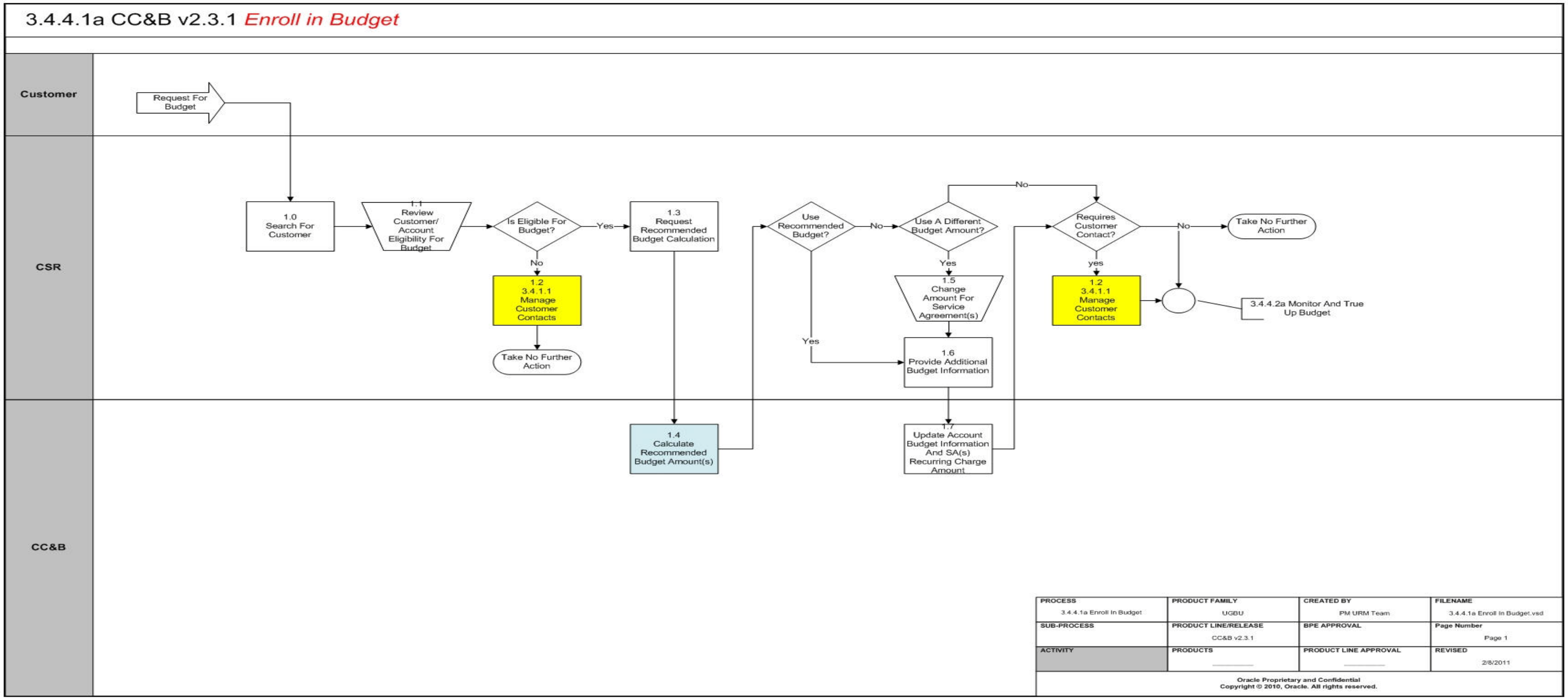
Detailed Business Process Model Description

This chapter provides a detailed description of the Enroll in Budget business process. This includes:

- **Business Process Diagrams**
    - **Enroll in Budget**
- **Enroll in Budget Description**
- **Installation Options - Control Central Alerts**
- **Related Training**

Business Process Diagrams

Enroll in Budget



Enroll in Budget Description

This section includes detailed descriptions of the steps involved in the Enroll in Budget business process, including:

1.0 Search for Customer

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request or inquiry for Budget, the CSR or Authorized User locates the customer in CC&B using Control Central Search.

1.1 Review Customer/Account Eligibility for Budget

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is dialogue with Customer. The CSR or Authorized User evaluates the account. Usually Account Financial History, Billing History, Credit Rating, and Credit and Collection History are reviewed. It's recommended to review Control Central Alerts as well. Control Central Alerts provide the CSR or any Authorized User with valuable insight for overall analysis of the customer and assist in determining eligibility for Budget.

Available Algorithm(s)
Installation Options - Control Central Alerts

1.2 3.4.1.1 Manage Customer Contacts

See **Enroll in Budget** 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 enters a Customer Contact to document Customer request. Refer to process 3.4.1.1 Manage Customer Contacts.

1.3 Request Recommended Budget Calculation

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If Customer is eligible for Budget, the CSR or Authorized User requests to calculate automatically the Recommended Budget Amount using the "Recommend" function on the Account/Budget page. CC&B allows automatic calculation for the recommended Budget amount for large Customers with more than 100 service Agreements. If more than 100 service agreements exist, a CSR or Authorized Personnel uses "Calculate and Apply" function to obtain the recommended Budget amount. Based on further discussion with the Customer, the CSR may use the recommended Budget amounts or make changes to some or all of the eligible Service Agreements.

1.4 Calculate Recommended Budget Amount(s)

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B calculates the recommended Budget amount for eligible SA's based on the Account's configured Budget Plan and provides CSR or Authorized User results of calculations for review and analysis.

Entities to Configure
Budget Plan,
Customer Class/Controls
SA Type

Available Algorithm(s)
COM BUDCALC (alg type BUDCALC-BH) Calculate Budget using Premise Bill History with no estimated bills
RES BUDCALC (alg type BUDCALC-BH) Calculate Budget using Premise Bill History with no estimated bills
BUDCALC-PH - Calculate Budget using Premise Bill History with estimated bills
CI_BUDE-BRPA - Budget Ineligible If Broken PA Char Exists

1.5 Change Amount for Service Agreement(s)

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: During discussion with Customer, the CSR or Authorized User decides the recommended Budget amount cannot be used. He/she populates mutually agreed upon Budget amounts for each eligible Service Agreement.

1.6 Provide Additional Budget Information

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User follows established business rules and finalizes list of Service Agreements that participate in Budget plan, and updates all the Budget related details for eligible Service Agreement(s). See Account/Budget Page and Service Agreement/Recurring Charge Page to view details.

1.7 Update Account Budget Information and SA(s) Recurring Charge Amount

See **Enroll in Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Account Budget information is updated, and the individual recurring charge effective date and amounts are stored for each Service Agreement. If the Budget information is entered on the Start Service confirmation window, the system will populate the Budget information on the Account and update the effective date and recurring charge amount for the Service Agreement(s).

See also True Up process (3.4.4.2a Monitor and True Up Budget)

Installation Options - Control Central Alerts

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, Credit and Collections