

**Oracle Utilities Customer Care and Billing
Release 2.4.0**

Utility Reference Model

4.2.2.8 Manage Billing Disputes

December 2015

Oracle Utilities Customer Care and Billing Utility Reference Model 4.2.2.8, Release 2.4.0

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

4.2.2.8 Manage Billing Disputes

4.2.2.8 Manage Billing Disputes	1
Brief Description	2
Actors/Roles.....	2
Business Process Diagrams	3
Manage Billing Disputes Process Model - Page 1	3
Manage Billing Disputes Process Model - Page 2.....	4
Manage Billing Disputes Process Model - Page 3	5
Manage Billing Disputes Detailed Process Model Description.....	6
1.0 Search for Customer.....	8
1.1 Evaluate Customer Account Eligibility for Rebill	8
1.2 Request Credit Note.....	8
1.3 Create Credit Note.....	8
1.4 Enter Specific Requirements for Bill Segments Calculation	9
1.5 Request Re-Bill Bill Segments.....	9
1.6 Determine Bill Period, Consumption Period, Service Point, Meter, and Meter Read.....	9
1.7 Determine Prorated Bill Period, Consumption Period, Service Point, Meter, and Meter Read	10
1.8 Verify Eligibility for Estimation	11
1.9 Estimate Meter Read	11
2.0 Determine and Cancel Applicable Estimated Segments	12
2.1 Calculate and Create Bill Segments Using Rates.....	12
2.2 Create Financial Transactions	13
2.3 Add Final Bill Switch for Bill Segments	13
2.4 Review Generated Bill Segments.....	13
2.5 Request Modify Information	14
2.6 Update Information.....	14
2.7 Request Undo ReBill Bill Segments.....	14
2.8 Delete New Segments and Return Original Bill Segments to Frozen.....	14
2.9 Request Cancel Frozen Segments	14
3.0 Update Bill Segments to Pending Cancel.....	15
3.1 Request Undo Cancel.....	15
3.2 Return Original Bill Segments to Frozen.....	15
3.3 Request Finalize Cancel Bill Segments	15
3.4 Update Bill Segments to Canceled	15
3.5 Request Freeze Bill Segments	16
3.6 Freeze Bill Segments	16
3.7 Request Generate Bill Segments.....	16
3.8 Evaluate Customer's Current Bill for Reopen Eligibility.....	16
3.9 Request Reopen Bill	17
4.0 Update Current Bill to Reopen.....	17
4.1 Request Add Adjustment	17
4.2 Create Adjustment	17
4.3 Request Cancel Adjustment	17
4.4 Cancel Existing Adjustment.....	18

4.5 Request Add Payment.....	18
4.6 Create Payment	18
4.7 Request Cancel Payment.....	19
4.8 Cancel Existing Payment.....	19
4.9 Request Add Bill Messages.....	19
5.0 Create Bill Messages	19
5.1 Create Bill Message.....	20
5.2 Create Estimated Meter Read Message	20
5.3 Create Bill Messages Based on Configuration.....	21
5.4 Keep Credit on Excess Credit SA	21
5.5 Apply Credit to SA's According to Specific SA Type Rules	22
5.6 Add Required Financial Transactions to Bill (Adjustments, Payments, Bill Corrections)	22
5.7 Determine Due Date, Late Payment Charge Date, and Credit Review Date	22
5.8 Add Post Bill Completion Activity	23
5.9 Make Necessary Changes for Bill.....	23
6.0 Extract Bill for Delivery.....	23
6.1 Produce Bill	24
6.2 Send Bill to Customer	24
6.3 Receives Bill.....	24
Installation Options - Control Central Alert Algorithms	25
Various Rate Schedule Algorithms and Major Configuration Information	26
Various Adjustment Algorithms and Major Configuration Information	28
Related Training.....	30

4.2.2.8 Manage Billing Disputes

This section provides a description of the “Manage Billing Disputes” business process. It includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Manage Billing Disputes Process Model - Page 1](#)
 - ♦ [Manage Billing Disputes Process Model - Page 2](#)
 - ♦ [Manage Billing Disputes Process Model - Page 3](#)
- ♦ [Manage Billing Disputes Detailed Process Model Description](#)
- ♦ [Installation Options - Control Central Alert Algorithms](#)
- ♦ [Various Rate Schedule Algorithms and Major Configuration Information](#)
- ♦ [Various Adjustment Algorithms and Major Configuration Information](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 4.2.2.8 Manage Billing Disputes

Process Type: Sub-Process

Parent Process: 4.2.2 CC&B Manage Bill

Sibling Processes:

- 4.2.2.1 CC&B Update Billing Information
- 4.2.2.2 CC&B Manage Meter Charges
- 4.2.2.3 CC&B Manage Item Charges
- 4.2.2.4 CC&B Manage External and Miscellaneous Charges
- 4.2.2.5 CC&B Manage Loan Charges
- 4.2.2.6 CC&B Manage Deposit Charges
- 4.2.2.9 CC&B Manage Billing Inquires
- 4.2.2.10a CC&B Manage Budget Billing
- 4.2.2.10b CC&B Manage Monitored and Unmonitored Non-Billed Budget Billing
- 4.2.2.12 CC&B Manage Payment Arrangement Charges
- 4.2.2.14 CC&B Manage Off Cycle Bill for External and Miscellaneous Charges

This process describes Cancel and Re-Billing for Metered services. A Bill is used to communicate financial obligations to the customer. The customer may have many services with an organization. The customer receives a Bill at regularly scheduled intervals for each established Account. The total amount owed, as well as financial and consumption details for each service, is placed on a Bill for payment within a set time period.

Sometimes the Bill sent to the Customer was valid, however with additional information now requires revisions. The meter may be over or under read, fieldwork for a meter exchange needs to be recorded, or a payment was posted to the wrong account. The CSR or Authorized User adds or makes changes in the records. The old Bill Segments are canceled and replaced with corrected Bill Segments containing the new information. The original Financial Transactions are canceled and new Financial Transactions are created. The changes typically appear on the next Bill for the Customer. The Customer may request and can receive a separate, updated Bill.

The customer is still responsible for payment by a given due date. Based on established business rules, the CSR or Authorized User may allow the Customer additional time to pay or override late payment charges due to Bill corrections. If the Customer does not pay, CC&B can detect the overdue amounts and provide notification.

Actors/Roles

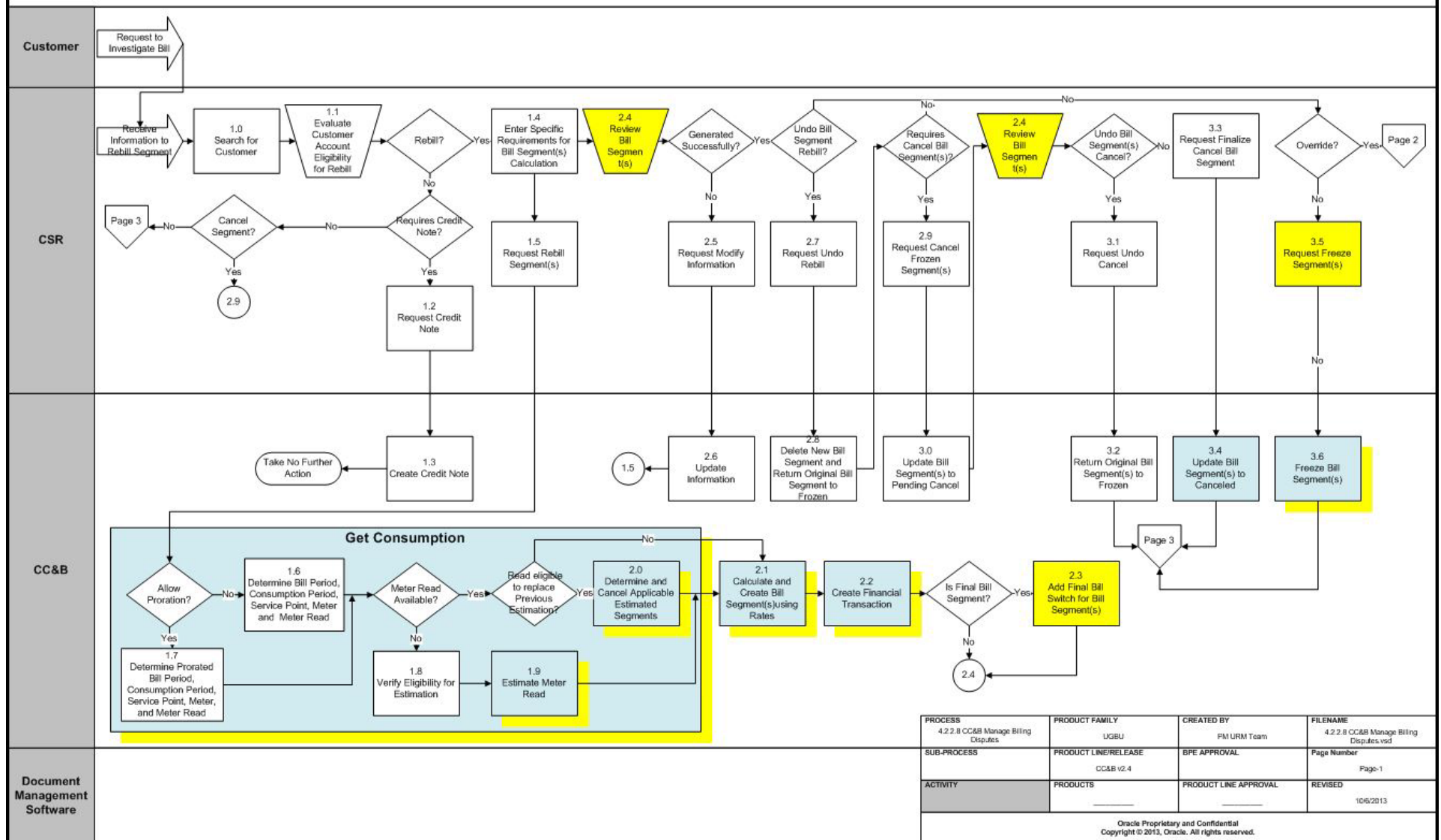
The Manage Billing Disputes business process involves the following actors and roles:

- **CC&B:** The Customer Care and Billing application.
- **Customer:** Utility Company Customer
- **CSR:** CSR or Authorized User of the Customer Care and Billing application.
- **Document Management Software:** Document Management Software that allows create and maintain paper or paperless documents and manage document workflow.

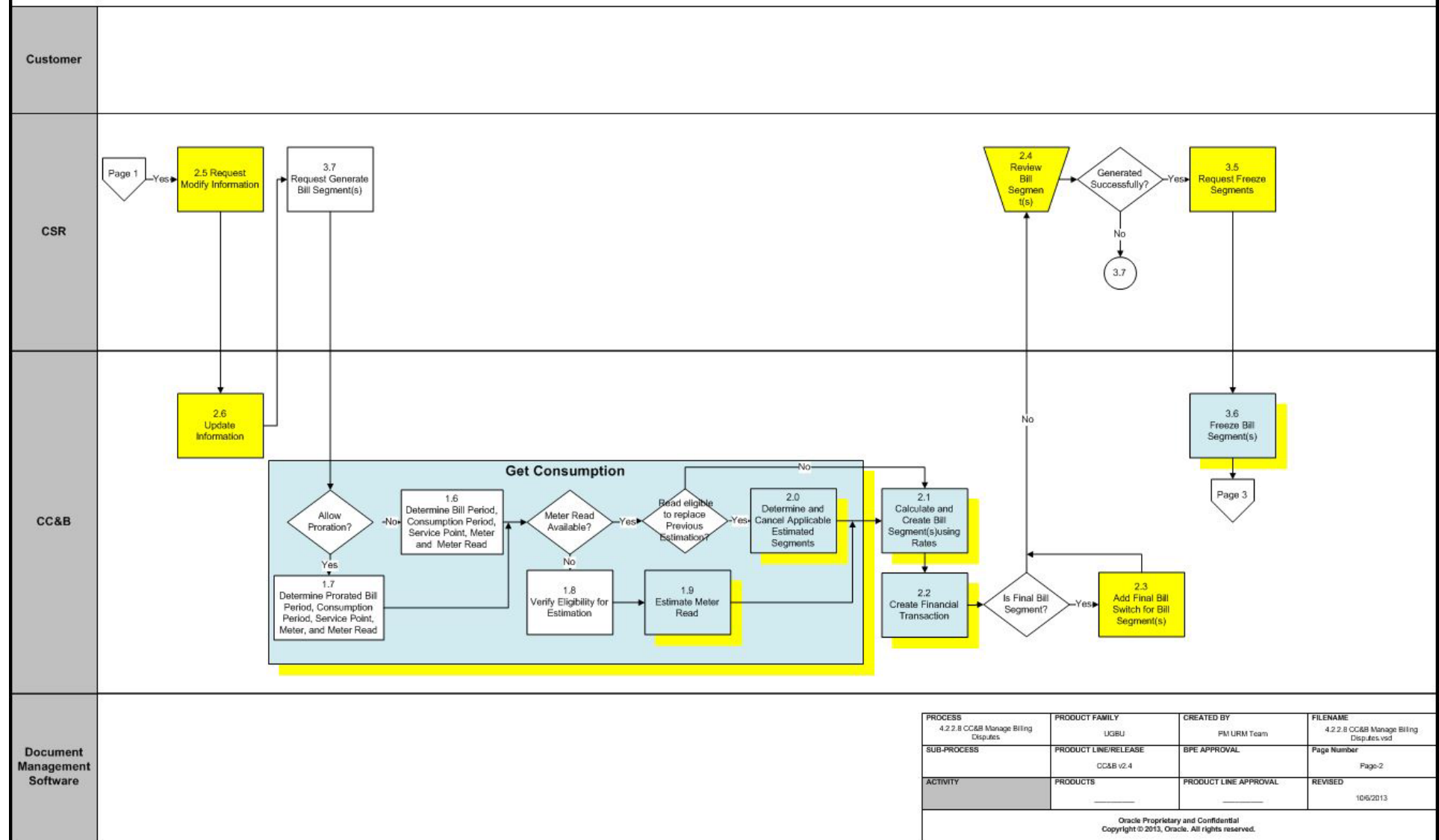
Business Process Diagrams

Manage Billing Disputes Process Model - Page 1

4.2.2.8 CC&B v2.4 *Manage Billing Disputes*

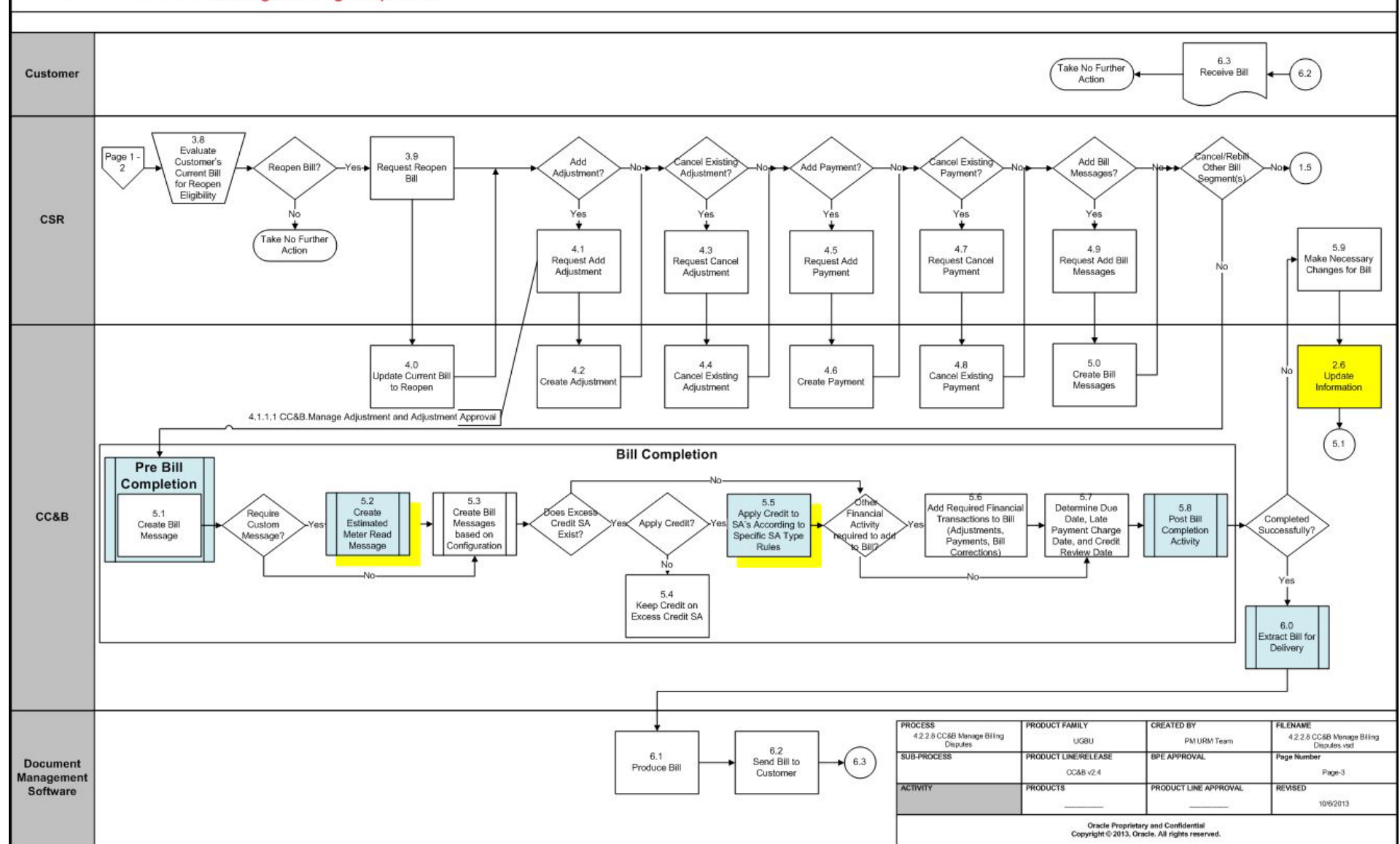


Manage Billing Disputes Process Model - Page 2

4.2.2.8 CC&B v2.4 *Manage Billing Disputes*

Manage Billing Disputes Process Model - Page 3

4.2.2.8 CC&B v2.4 *Manage Billing Disputes*



Manage Billing Disputes Detailed Process Model Description

This section provides a detailed description of the “Manage Billing Disputes” business process, including:

- ♦ 1.0 Search for Customer
- ♦ 1.1 Evaluate Customer Account Eligibility for Rebill
- ♦ 1.2 Request Credit Note
- ♦ 1.3 Create Credit Note
- ♦ 1.4 Enter Specific Requirements for Bill Segments Calculation
- ♦ 1.5 Request Re-Bill Bill Segments
- ♦ 1.6 Determine Bill Period, Consumption Period, Service Point, Meter, and Meter Read
- ♦ 1.7 Determine Prorated Bill Period, Consumption Period, Service Point, Meter, and Meter Read
- ♦ 1.8 Verify Eligibility for Estimation
- ♦ 1.9 Estimate Meter Read
- ♦ 2.0 Determine and Cancel Applicable Estimated Segments
- ♦ 2.1 Calculate and Create Bill Segments Using Rates
- ♦ 2.2 Create Financial Transactions
- ♦ 2.3 Add Final Bill Switch for Bill Segments
- ♦ 2.4 Review Generated Bill Segments
- ♦ 2.5 Request Modify Information
- ♦ 2.6 Update Information
- ♦ 2.7 Request Undo ReBill Bill Segments
- ♦ 2.8 Delete New Segments and Return Original Bill Segments to Frozen
- ♦ 2.9 Request Cancel Frozen Segments
- ♦ 3.0 Update Bill Segments to Pending Cancel
- ♦ 3.1 Request Undo Cancel
- ♦ 3.2 Return Original Bill Segments to Frozen
- ♦ 3.3 Request Finalize Cancel Bill Segments
- ♦ 3.4 Update Bill Segments to Canceled
- ♦ 3.5 Request Freeze Bill Segments
- ♦ 3.6 Freeze Bill Segments
- ♦ 3.7 Request Generate Bill Segments
- ♦ 3.8 Evaluate Customer's Current Bill for Reopen Eligibility
- ♦ 3.9 Request Reopen Bill
- ♦ 4.0 Update Current Bill to Reopen
- ♦ 4.1 Request Add Adjustment
- ♦ 4.2 Create Adjustment
- ♦ 4.3 Request Cancel Adjustment
- ♦ 4.4 Cancel Existing Adjustment
- ♦ 4.5 Request Add Payment
- ♦ 4.6 Create Payment
- ♦ 4.7 Request Cancel Payment
- ♦ 4.8 Cancel Existing Payment
- ♦ 4.9 Request Add Bill Messages
- ♦ 5.0 Create Bill Messages
- ♦ 5.1 Create Bill Message
- ♦ 5.2 Create Estimated Meter Read Message
- ♦ 5.3 Create Bill Messages Based on Configuration
- ♦ 5.4 Keep Credit on Excess Credit SA

- ♦ 5.5 Apply Credit to SA's According to Specific SA Type Rules
- ♦ 5.6 Add Required Financial Transactions to Bill (Adjustments, Payments, Bill Corrections)
- ♦ 5.7 Determine Due Date, Late Payment Charge Date, and Credit Review Date
- ♦ 5.8 Add Post Bill Completion Activity
- ♦ 5.9 Make Necessary Changes for Bill
- ♦ 6.0 Extract Bill for Delivery
- ♦ 6.1 Produce Bill
- ♦ 6.2 Send Bill to Customer
- ♦ 6.3 Receives Bill

1.0 Search for Customer

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Upon receipt of request or inquiry for Rebilling the CSR or Authorized User accesses Control Central Search to locate the customer in CC&B.

Entities to Configure

- Installation Options

1.1 Evaluate Customer Account Eligibility for Rebill

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User evaluates the Account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts and other Dashboard information assist the CSR in determining eligibility for any Rebilling based on established business rules. Some organizations may consider the use of a Credit Note. The Credit Note allows for cancellation details to be sent to the Customer separately from any other Bill. Alternatively, a Correction Note option may be used. The Correction Note allows for cancellation and rebilling details to be sent to the customer separately from any bill. CC&B has functionality to choose either option.

Based on established business rules the CSR or Authorized User may add or change existing information in order to Rebill the customer. Typical changes can include the addition of a new read, removing the use on Bill switch from an existing read, allow for estimation, or changes to dates. There are no specific restrictions on changes that need to be done across the application to calculate the correct Bill Segments.

Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)
- BIFN-BL INFO - This algorithm formats the Bill Information that appears throughout the system. Four different formats are used.

Entities to Configure

- Installation Options-Framework
- Customer Class

1.2 Request Credit Note

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines all or specific Bill Segments need canceling and the cancellation details be sent to the customer separately from any Bill. This separate Credit Note contains only the cancellation information.

1.3 Create Credit Note

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: A Credit Note is created in CC&B.

Available Algorithms

- C1-CN-ADNB - This customer class post bill completion algorithm recreates adjustments after a credit note is completed.
- C1-CN-RADJ - Reverse Adjustments When Creating Credit Note
- C1-CN-BRT - This customer class bill completion algorithm suppresses bill routings for credit notes.

Entities to Configure

- Installation Options-Billing

1.4 Enter Specific Requirements for Bill Segments Calculation

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: If the CSR or Authorized identifies a need to Rebill, information about the Billing period must be provided. The CSR or Authorized User specifies Cutoff Date or Use Schedule to determine the end date for each Bill Segment Bill period. The Accounting Date defaults to current date however the CSR or Authorized User may change this date based on established business rules. The CSR or Authorized User may choose to allow for system estimation and will mark accordingly. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Entities to Configure

- Accounting Calendar

1.5 Request Re-Bill Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on evaluation, available new information, or further investigation, the CSR or Authorized User now determines to Rebill the Bill Segments.

Entities to Configure

- Bill Cancel Reasons

1.6 Determine Bill Period, Consumption Period, Service Point, Meter, and Meter Read

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Get Consumption

Actor/Role: CC&B

Description: As a first step of Metered Service Bill Segment calculation, CC&B determines consumption to be billed. The system first determines the Bill Period boundary. The end date is either the end date of Bill cycle schedule window, the Service Agreement's end date, or, determined by the CSR or Authorized User for online Billing. If this is the first Bill Segment for the Service Agreement, the Bill Segment start date is set to the start date of the Service Agreement, otherwise the start date is the previous Bill Segment's end date. The system next determines the Consumption Period boundary, and retrieves appropriate Service Point, Meter, and associated Meter Reads. Meter Reads determine the start and end date for the Bill Segment Consumption Period.

The consumption period is the inclusive period passed to the Rates. It is used for calculating the charges for the Bill Segments. The system looks at every service point linked to the Service Agreement. The system retrieves each meter linked to each Service Point during the Bill period (a service point has multiple meters when a meter exchange has occurred during the Bill period). Refer to 4.2.2.2 CC&B Manage Meter Charges.

Note: The system ignores Service Points that are not billable, disconnected before the Bill period started, or are yet to be connected as of the Bill end date.

Available Algorithms

- BSGC-SP - Get Consumption From SP's Linked To SA.
- BSGC-MS - Get consumption from Master Bill Segment.
- C1-BSGC-USG - Get bill segment consumption using a usage request, using bill determinants from MDM.
- OVPF-NOPROR - No Proration based on RC characteristic.

Entities to Configure

- Frequency
- Bill Cycles
- Bill Segment Type
- Rates ([Various Rate Schedule Algorithms and Major Configuration Information](#))
- SA Types

Business Objects

- C1-UsageRequestCyclicalBilling - MDM Cyclical Billing Usage Request
This business object defines the behavior of a usage request created from the cyclical or batch billing process.
- C1-CyclicalUsgReqOutMsg - MDM Cyclical Billing Usage Request Outbound Message
This business object is used to request bill determinants from MDM for a cyclical or batch bill.
- C1-UsageRequestNonCyclical - MDM Non-Cyclical Billing Usage Request
This business object defines the behavior of a usage request created from non-cyclical or online bill generation.
- C1-NonCyclicalUsgReqOutMsg - MDM Non- Cyclical Billing Usage Request Outbound Message. This business object is used to request bill determinants from MDM for a non-cyclical or online bill.

1.7 Determine Prorated Bill Period, Consumption Period, Service Point, Meter, and Meter Read

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Get Consumption

Actor/Role: CC&B

Description: As a first step of Metered Service Bill Segment calculation, CC&B determines consumption to be billed. The system first determines the prorated Bill Period boundary. The end date is either the end date of Bill cycle schedule window, the Service Agreement's end date, or, determined by the CSR or Authorized User for manual Billing. If this is the first Bill Segment for the Service Agreement, the Bill Segment start date is set to the start date of the Service Agreement; otherwise the start date is the previous Bill Segment's end date. The system next determines the Consumption Period boundary, and retrieves appropriate Service Point, Meter, and associated Meter Reads. Meter Reads determine the start and end date for the Bill Segment Consumption Period.

The consumption period is the inclusive period passed to the Rates. It is used for calculating the charges for the Bill Segment. The system looks at every service point linked to the Service Agreement. The system retrieves each meter linked to each Service Point during the Bill period (a service point has multiple meters when a meter exchange has occurred during the Bill period).

Note: The system ignores Service Points that are not billable, disconnected before the Bill period started, or are yet to be connected as of the Bill end date.

If this is the first or final Bill Segment for the customer, the number of days may be more or less than the normal Bill period. Based on established business rules, the system allows for proration of first or final Bill Segment as well as other Bill Periods outside the normal time period. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Note: Every SA type defines the minimum number of days on a Bill Segment. Whenever the system attempts to create a Bill Segment other than the final Bill Segment, it checks if the number of days is at least as great as the minimum defined on the SA type. If the minimum number of days is not met, the Bill Segment will not be created at this time. The system waits until the number of days in the Bill Segment is at least as large as the minimum and the account's Bill cycle must be open.

Available Algorithms

- BSGC-SP - Get Consumption From SP's Linked To SA.
- BSGC-MS - Get consumption from Master Bill Segment.
- C1-BSGC-USG - Get bill segment consumption using a usage request, using bill determinants from MDM.

Entities to Configure

- Frequency
- Bill Cycles
- Bill Segment Type and associated algorithms
- Rates ([Various Rate Schedule Algorithms and Major Configuration Information](#))
- SA Types

1.8 Verify Eligibility for Estimation

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Get Consumption

Actor/Role: CC&B

Description: If no reads can be found, CC&B verifies the Customer's Service Agreement is eligible to estimate a read. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Entities to Configure

- SA Types

1.9 Estimate Meter Read

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Get Consumption

Actor/Role: CC&B

Description: If eligibility requirements are met, the system estimates consumption and generates a corresponding system estimated read. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- MR EST TREND - This algorithm uses trends for estimating meter reads.
- TSMRE-LA - This algorithm uses a combination of methods: it looks historically one year ago, the immediate preceding Bill period, or uses Trend if no historical reads can be found.

Entities to Configure

- Frequency
- Bill Cycles
- Rates Schedule
- Trend

2.0 Determine and Cancel Applicable Estimated Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Get Consumption

Actor/Role: CC&B

Description: CC&B can cancel previously estimated Bill Segments and Bill over an extended period of time from one non-estimated read to another. If the system creates a Bill Segment with a read with a defined Good Read Type, CC&B will cancel previous Bill Segments that contain system-estimated meter reads until it detects a Bill Segment with a reading that is less than the reading on the current Bill Segment. The maximum number of Bills that are automatically canceled is configurable. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BSAXERLIM - This algorithm cancels historical, estimated Bill Segments when a defined “real” read is used on the current Bill.

Entities to Configure

- Bill Segment Type

2.1 Calculate and Create Bill Segments Using Rates

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B passes the consumption information to rates to calculate the new Bill Segment. The rate components are used to build the Bill Segment calculation lines and referenced on these calculation lines. In addition the original Bill Segment is placed in pending Cancel status. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BSBS-RT - This Bill Segment creation algorithm creates a Bill Segment using the service agreement's rate. The option would typically be used for metered services and ratable non-metered services.
- BSBS-RR - Create bill segment using the service agreement's recurring charge amt.
- BSBS-RB - Bill recurring charge until amt to bill has been billed.
- BSBS-RA - Bill recurring charge amount until payoff bal = 0.
- BSBS-BC - Create bill segments using billable charges.
- BSBS-LO - Create a bill segment for a loan SA.
- C1-BSBS-UR - Create bill segment using a usage request (CC&B-MDM integration).
- C1-HIGHBILL - This algorithm type checks for high bill amounts during batch billing.

Entities to Configure

- Bill Segment Type
- Rates ([Various Rate Schedule Algorithms and Major Configuration Information](#))
- SA Type - Billing Process Sequence

2.2 Create Financial Transactions

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B creates the associated financial details related to the Bill Segment. The Financial Transaction contains the financial effects of the Bill Segment on the service agreement's current and payoff balances and on the General Ledger. If a Bill Segment is cancelled, another Financial Transaction is created to reverse the original financial transaction. The financial details appear on the next Bill produced for the account as a Bill correction. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BSBF-BA - Payoff Amt = Bill Amt / Current Amt = Amt Due
- BSBF-B0 - NO PAYOFF! Payoff = 0 / Curr Amt = Bill Amt -no GL
- BSBF-CU - COMPANY USAGE! Payoff = Curr = 0 (GL affected)
- BSBF-LO - Payoff Amt = Interest / Current Amt = Principal
- C1-C0-GL - Payoff Amt = Bill Amt / Current Amt = 0 (GL affected)
- C1-C0-NOGL - Payoff Amt = Bill Amt / Current Amt = 0 (no GL)

Entities to Configure

- Rates ([Various Rate Schedule Algorithms and Major Configuration Information](#))
- Customer Class
- Bill Segment Type

2.3 Add Final Bill Switch for Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: If this is the final Bill Segment for this Service Agreement it will be marked as closing. The Service Agreement must be stopped for this switch to be turned on. Refer to 4.2.2.2 CC&B Manage Meter Charges.

2.4 Review Generated Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the rebilled Bill Segment for accuracy and determines the next action. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- C1-BSI-INFO This algorithm formats the "Bill Segment Information" that appears throughout the system. It concatenates the fields and delimiters specified as algorithm parameters.

Entities to Configure

- Installation Options

2.5 Request Modify Information

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on established business rules the CSR or Authorized User may add or change the existing information used for the Bill Segment calculation. Typical changes can include the addition of a new read, removing the use on Bill switch from an existing read, allow for estimation, changes to dates, recording of a meter exchange or other changes in the data. There are no specific restrictions on changes that need to be done across the application to calculate the correct Bill Segment. While infrequent, there may be times when actual meter reads do not reflect consumption accurately. Based on established business rules the CSR or Authorized User may determine to override consumption. These changes are also reflected on the Bill Segment.

2.6 Update Information

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Changes by the CSR or Authorized User are updated in CC&B.

2.7 Request Undo ReBill Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines not to freeze the new Bill Segments. If the undo function is used, the newly generated segment is deleted.

2.8 Delete New Segments and Return Original Bill Segments to Frozen

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B deletes the newly generated segment and returns the original Bill Segment to frozen. There is no impact to Financial Transactions. Refer to 4.2.2.2 CC&B Manage Meter Charges.

2.9 Request Cancel Frozen Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The Bill Segments may just be canceled and not created again. The CSR or Authorized User initiates the cancel function. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Entities to Configure

- Bill Cancel Reason

3.0 Update Bill Segments to Pending Cancel

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The existing Bill Segments is updated to Pending Cancel in CC&B. Refer to 4.2.2.2 CC&B Manage Meter Charges.

3.1 Request Undo Cancel

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User has the option to undo the pending Cancel Bill Segments. Prior to the cancellation the CSR or Authorized User determines the Bill Segments should not be canceled, and uses the Undo function. Refer to 4.2.2.2 CC&B Manage Meter Charges.

3.2 Return Original Bill Segments to Frozen

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The original Bill Segments is returned to Frozen in CC&B. There is no impact to Financial Transactions. Refer to 4.2.2.2 CC&B Manage Meter Charges.

3.3 Request Finalize Cancel Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the cancellation of Bill Segments. The Financial Transaction is also canceled. Refer to 4.2.2.2 CC&B Manage Meter Charges.

3.4 Update Bill Segments to Canceled

Reference: [Manage Billing Disputes Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The existing Bill Segments is updated to Canceled status in CC&B. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BSFZ-EMPTY - An empty sample algorithm for BS Freeze/Cancel.
- C1-BSFZ-BCH - Cancel Bill Segment Billable Charges, when the bill is linked to an off-cycle bill generator.

3.5 Request Freeze Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines all information is in place and the freezable Bill Segments is accurate. The CSR or Authorized User freezes the Bill Segments. Refer to 4.2.2.2 CC&B Manage Meter Charges.

3.6 Freeze Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill Segments and associated Financial Transaction are frozen in CC&B. The Bill Freeze Option on the Installation Options controls when a Service Agreement's balance and General Ledger is affected by the Bill Segment and must be configured to meet the organization's accounting practices. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BSBF-BA - This Bill Segment financial transaction algorithm creates a financial transaction for a Bill Segment where $\text{Payoff amount} = \text{Bill amount} - \text{Current amount} = \text{Bill amount} / \text{zero} / \text{recurring charge amount}$.
- BSFZ-EMPTY - This is a Customer Class Bill Segment freeze/cancel algorithm.

Entities to Configure

- Installation Options - Billing
- Bill Segment Type
- Customer Class

3.7 Request Generate Bill Segments

Reference: [Manage Billing Disputes Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines to (re) generate the Bill Segment. A new segment is created reflecting the changes and the original segment is in pending cancel status. The generate function is used when creating a new Bill, Bill Segment, or re-generating an existing freezable or error segment.

3.8 Evaluate Customer's Current Bill for Reopen Eligibility

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: At times it may be necessary to reopen the most recent Bill. Possibly a payment or adjustment was not included in the original Bill. A Bill Segment may need rebilling and the changes reflected in a new Bill. The CSR or Authorized User evaluates the account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts, other Dashboard information and established business rules assist the CSR or Authorized User in determining eligibility for reopening the current Bill.

Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)
- BIFN-BL INFO This algorithm formats the Bill Information that appears throughout the system. Four different formats are used.

Entities to Configure

- Installation Options

3.9 Request Reopen Bill

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines to reopen a Bill for the Customer's account.

4.0 Update Current Bill to Reopen

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The current Bill is reopened in CC&B and available for applicable changes.

4.1 Request Add Adjustment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on investigation and established business rules, the CSR or Authorized User determines to add an Adjustment for one or more Service Agreements.

Available Algorithms

- C1-ADI-STD - Common Adjustment Information
- C1-ADT-INFO - Adjustment Information defined for an Adjustment Type

4.2 Create Adjustment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: An Adjustment and associated Financial Transaction is created in CC&B.

Entities to Configure

- Adjustment Algorithms/Entities to Configure ([Various Adjustment Algorithms and Major Configuration Information](#))

4.3 Request Cancel Adjustment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on investigation and established business rules, the CSR or Authorized User determines to cancel an existing adjustment for one or more Service Agreements.

4.4 Cancel Existing Adjustment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: An existing Adjustment is canceled in CC&B. If Adjustment is canceled, another Financial Transaction is created to reverse the original Financial Transaction.

Entities to Configure

- Adjustment Algorithms/Entities to Configure ([Various Adjustment Algorithms and Major Configuration Information](#))

4.5 Request Add Payment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on investigation and established business rules, the CSR determines to add a Payment for one or more Service Agreements.

Available Algorithms

- PYFN-PY INFO - Payment information
- C1-TL-PY-EVT - Build Payment Events

Entities to Configure

- F1-TIMELINE

4.6 Create Payment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: A Payment and associated Financial Transaction is created in CC&B. Refer to 4.3.1.1 CC&B Manage Payments.

Available Algorithms

- C1-NCPAY-FT - Create FT for Non CIS Payments.
- C1-FTGL-PSAC - Deferred Accrual Payoff = Current = Payment Amt (only for Accrual Accounting)
- PSEG-AC - Payoff=Current=Payment Amt (only for Cash Accounting)
- PSEG-CA - Payoff Amt = 0 / Cur Amt = Pay Amt / GL AFFECTED (charity payments)
- PSEG-NM - Payoff Amt = Current Amt = Pay Amt (all pmt segments except charity)
- C1-CR-PAY-DF - Pay an SA via SA Characteristic
- OVRPY-CREDSA - Keep overpayment on a "credit SA"
- OVPY-LO-CSA - Keep overpayment on a loan SA
- OVRPY-PPRTY - Keep overpayment on highest priority SA
- C1-OPPY-PPSA - Keep Overpayment on a Prepaid SA
- C1-BOV-TPDTL - Non CIS Payment Template Validation
- PYDIST-DELPY - Pay delinquent high priority debt first - PRORATED
- PYDIST-PPRTY - Distribute Based On SA Type Priority/Debt Age
- C1-PYDS-BDU - Distribute by Bill Due Date (for Open Item accounting)

Entities to Configure

- Payment Segment Type
- Pay Method
- Payment Template
- Distribution Rule
- Customer Class

Business Object

- C1-CISPaymentEvent - Payment Event - CIS Payment
- C1-NonCISPayTemplate - Payment Template - Non CIS Payments
- C1-NonCISPaymentEvent - Payment Event - Non CIS Payment

4.7 Request Cancel Payment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on investigation and established business rules, the CSR determines to cancel an existing Payment for one or more Service Agreements.

4.8 Cancel Existing Payment

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: An existing payment is canceled in CC&B. If a payment is canceled, another Financial Transaction is created to reverse the original Financial Transaction.

Entities to Configure

- Pay Cancel Reason

4.9 Request Add Bill Messages

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User may add Service Agreement related Bill Messages for a given Bill Segments. The CSR or Authorized may also add Bill Messages at the Account Level. The CSR or Authorized User adds these Bill Messages for an online Bill. Other Bill Messages are added during Bill Completion. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Entities to Configure

- Bill Messages

5.0 Create Bill Messages

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: Bill Messages are added in CC&B. Refer to 4.2.2.2 CC&B Manage Meter Charges.

5.1 Create Bill Message

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Pre-Bill Completion

Actor/Role: CC&B

Description: CC&B makes use of Pre-Bill Completion algorithms. Based on configuration, one such algorithm can delete Bill Segments in error, create Bill messages for the deleted segments, and create a To Do entry. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- DEL BSEG - This Bill pre-completion algorithm deletes Bill Segments that are in Error.
- CPBC-DB - This customer class pre bill completion algorithm determines to delete a bill if it only contains frozen financial transactions of given types
- C1-CPBC-TAXT - Apply Taxation Threshold
- CPBC-DMCH - Apply De Minimize Rule
- C1-CSB-EBC - Complete bill at end of bill cycle; This algorithm skips completion of a bill until the bill cycle schedule end date.

Entities to Configure

- To Do Type
- To Do Role
- Bill Message
- SA Type
- Customer Class

5.2 Create Estimated Meter Read Message

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Bill Completion

Actor/Role: CC&B

Description: CC&B creates an estimated read Bill message if an estimated read was used for Billing. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BCMP-ESTBSM - This Bill Segment completion algorithm attaches a Bill Message Code to a Bill Segment that used an estimated read.

Entities to Configure

- Bill Messages
- SA Type

5.3 Create Bill Messages Based on Configuration

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Bill Completion

Actor/Role: CC&B

Description: CC&B creates other Bill Messages during Bill completion. Bill Messages come from a variety of sources:

- Account Bill Messages
- Customer Class Bill Messages
- Service Agreement related Messages that are linked to Bill Segments
- Rate Schedule Bill Messages
- Service Provider Bill Messages
- Meter Reader Remark Bill Messages
- Ad hoc Messages by CSR or Authorized User
- Custom Background Processes and Algorithm Bill Messages

Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- C1-CREABMCS - Create Account Bill Message From Case
- C1-CREABMFA - Create Account Bill Message From FA Remark
- C1-CREPPBBM - Create Prepay Biller Bill Message
- SCEC-BM - SC Event Completion - Create Bill Message

Entities to Configure

- Customer Class Bill Messages
- Rates ([Various Rate Schedule Algorithms and Major Configuration Information](#))
- Meter Reader Remark Bill Messages
- Account and Service Agreement Bill Messages
- Service Credit Event Type
- SA Type

5.4 Keep Credit on Excess Credit SA

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Bill Completion

Actor/Role: CC&B

Description: When specifically defined, CC&B can keep any excess credit on an Excess Credit SA. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- CREDIT-XFER - This Bill Segment completion algorithm will transfer the balance of a credit SA to other SAs linked to the account.

Entities to Configure

- SA Type
- Adjustment Type

5.5 Apply Credit to SA's According to Specific SA Type Rules

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Bill Completion

Actor/Role: CC&B

Description: When specifically defined, CC&B can apply any excess credit on an Excess Credit SA. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- CREDIT-XFER - This Bill Segment completion algorithm will transfer the balance of a credit SA to other SAs linked to the account.

Entities to Configure

- SA Type
- Adjustment Type

5.6 Add Required Financial Transactions to Bill (Adjustments, Payments, Bill Corrections)

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Bill Completion

Actor/Role: CC&B

Description: During Bill Completion CC&B adds any Adjustments, Payments or Bill corrections not included in the previous Bills to the newly created Bill. Refer to 4.2.2.2 Manage Meter Charges.

5.7 Determine Due Date, Late Payment Charge Date, and Credit Review Date

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Bill Completion

Actor/Role: CC&B

Description: During Bill Completion the Due Date, Late Payment Charge Date, and next Credit Review Date are determined and made available as information for the Bill and Account. More late payment charge information will be available in future processes. Two algorithms are listed below for information only. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BILPC-TOTAL - This algorithm type is used to calculate the late payment charge amount for a specific service agreement linked to an account.
- BILPC-SPRC - LPC method for service provider.
- BILPE-ALL - Determine if the amount is sufficient to levy LPCs.

Entities to Configure

- Late Payment Profile on SA Type
- Customer Class - Due Date, LPC eligibility, Late Payment Charge Grace Days
- Adjustment Types
- Rates

5.8 Add Post Bill Completion Activity

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B can perform various post Bill completion activities. One example is to recreate Adjustments after a Credit Note is completed.

Available Algorithms

- C1-CN-ADNB - This customer class post Bill completion algorithm recreates adjustments after a credit note is completed.
- C1-CR-BLRVWS - Create Bill Review Schedule.
- C1-MULT-DUDT - Additional Bill Due Dates.
- WX-SSBNOTIFY - Set Bill Notifications for Self-Service.

5.9 Make Necessary Changes for Bill

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: During Bill Completion there may be information missing or incomplete. One example is that the mailing address may be missing. The CSR or Authorized User reviews and resolves the error, enters correct data, and completes the Bill as needed.

6.0 Extract Bill for Delivery

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill is extracted and made available for printing. The Bill print process creates the flat file interfaced to Bill print software. This process uses all Bill routing extract records associated with its batch control that are marked with a supplied run number. The information extracted and placed on the flat Print software as needed. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Available Algorithms

- BLEX-EX - This algorithm constructs the records that contain the information that appears on a printed Bill.
- C1-BLEX-CR - This Bill Route Type extract algorithm prepares the report information needed to create a Bill using a Reporting Engine.
- C1-BLEX-XML - Create XML bill print extract records.
- C1-SUP-PR-BL - Suppress Printing Bills After Final Bill.

Process Names

- POSTROUT - CIPBXBLB, or other Custom Process

Entities to Configure

- Bill Route Type
- Customer Class

6.1 Produce Bill

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: Document Management Software

Description: The Bill is printed onsite or remotely using Bill print software outside of CC&B. Refer to 4.2.2.2 CC&B Manage Meter Charges.

6.2 Send Bill to Customer

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: Document Management Software

Description: The printed Bill is sent to the Customer. Refer to 4.2.2.2 CC&B Manage Meter Charges.

6.3 Receives Bill

Reference: [Manage Billing Disputes Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: Customer

Description: The Customer receives the Bill as defined for the Account or specific Bill. Refer to 4.2.2.2 CC&B Manage Meter Charges.

Entities to Configure

- Bill Route Type

Installation Options - Control Central Alert Algorithms

The following installation options are available:

Value	Description
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

Various Rate Schedule Algorithms and Major Configuration Information

Available Algorithms

- Bill Factor Rate Selection Date
- C1-BFRACCTG - Bill Factor Date based on Accounting Date
- C1-BFREND - Bill Factor Date based on Bill Segment End Date
- C1-BFRSTRT - Bill Factor Date based on Bill Segment Start Date

Various Rate Component Type Algorithms

- Rate Component Calculation
- C1-RC-CLAMT - Sum Calc Line Amounts
- RCAM-CCL - Calculate CCL
- DEEMEDPROF - Create Deemed Profile Data
- RCAM-VAT - Standard Rate VAT
- RCAM-VATR - Reduced Rate VAT
- MAX3KW - Capture maximum three kW interval values
- Rate Component Criteria Comparison - RECC>=2YEARS - Check if date is at least two years old

Rate Component Criteria Field

- RECF-AUTOPAY - Return True If On Autopay
- RECF-HASELEC - Return TRUE if account has electric service
- RECF-HASGAS - Return TRUE if account has gas service

Rate Component Interval Pricing

- IPRC-CNALL - Continuous cons. curve * price curve (fast)
- IPRC-NCNALL - Non continuous cons. curve * price curve (slower)
- IPRC-NCNPOS - Non continuous OVERAGE curve * price curve
- IPRC-NCNNEG - Non continuous UNDERAGE curve * price curve

Rate Component Interval Pricing Audit

- IPRCA-ALL - Show all consumption and prices
- IPRCA-EXCESS - Only show excess (positive) consumption and prices
- IPRCA-UNDER - Only show underage (negative) consump. and price

Rate Component Step Algorithm

- MULT BY KW - Multiply step by KW
- HIGHBP - Set step to high break point
- LOW BP - Set step to low break point

Rate Component Time of Use (TOU) Pricing

- M&P CONS - Map & Price Continuous, Consumptive Int Data
- M&P PEAK - Map & Price Continuous, Peak Interval Data
- TOUMAP1 - Create SQ entries by applying TOU map to int. cons

Rate Component Time of Use (TOU) Pricing Audit

- RCTPRSAU-CON - TOU Pricing Audit - Consumptive
- RCTPRSAU-PK - TOU Pricing Audit - Peak

Rate Component Value Algorithm

- PX PRICE - Extract avg price from weekly spot market prices
- RCVALTHRSQS - Calc. price based on threshold 400 KWH OFF
- CI_RNDXRF - Round Cross-Reference Amount

Other Algorithms Related to Rates

- BSBS-RT-DFT - Create bill segment using rate application
- ADJG-RT - Adjustment generation - apply rate
- CI_ADJ-RT-TX - Adjustment generation - apply rate
- CALL RATEAPP - Apply the rate to each billing scenario

Entities to Configure

- Rate Schedule
- Rate Version
- Rate Components
- Service Quantity Rules
- Register Rules
- Service Quantity Identifiers
- Unit of Measure
- Frequency
- Bill Factors
- Characteristics
- Distribution Codes
- Various Algorithm Parameters
- Define Rates on Applicable SA Types
- Meter Configuration Type
- Bill Messages
- Eligibility Rules

Various Adjustment Algorithms and Major Configuration Information

Available Algorithms

- Adjustment type - Adjustment Cancellation: CI_ADCA-CRTD - Adjustment Cancellation - Create To Do Entry
- Adjustment type - Adjustment FT Creation:
 - ADJT-CA - Payoff Amt = 0 / Current Amt = Adj Amount (no GL)
 - ADJT-GL - FIX GL ONLY! Payoff = Current = 0 (GL only)
 - ADJT-NM - Payoff Amt = Adj / Current Amt = Adj
 - ADJT-TA - Payoff Amt = Adj / Current Amt = 0
 - CI_ADJT-ST - FT - GL Creation for Settlement Adjustments
- Adjustment type - Adjustment Freeze: CI_ADFR-CRTD - Adjustment Freeze - Create To Do Entry
- Adjustment type - Adjustment Information: CI_ADT-WO - Write Off Adjustment Description
- Adjustment type - Default Adjustment Amount: No algorithms exist, but a sample algorithm type exists:
DAMT-EMPTY - Default Adjustment Amount - Empty Sample Algorithm
- Adjustment type - Determine SA: No algorithms exist, but a sample algorithm type exists:
C1-SABYBADGE - Get Prepaid SA Using Badge Number
- Adjustment type - Generate:
 - ADJG-RT - Adjustment generation - apply rate
 - CI_ADJ-RT-TX - Adjustment generation - apply rate
 - CI_ADJG-WO - Generate Adjustment - Write Off Bills
- Adjustment type - Resolve Suspense: No algorithms exist, but a sample algorithm type exists:
C1-CANSUSADJ - Cancel Suspense Adjustment
- Adjustment type - Validate Adjustment: CI_VALXFRADJ - Validate Transfer Adjustment
- Approval Profile (BO) - Determine Approval Requirements: C1-ADJREQTDF - Determine Adjustment Approval Requirements Default

Business Objects

- Business Object - Information: C1-ADJARI-DF - Adjustment Approval Request Information
- Business Object - Validation: C1-ADJAP-DF - Adjustment Approval Profile Validation - Default
- Business Object Status - Monitor: CI_ADTIMEOUT - Check for Adjustment Approval Request Timeout

Entities to Configure

- SA Type - Payment Freeze: STPZ-RMVCR - Create adjustment to remove SA's credit
- Service Credit Event Type - Event Cancellation: SCEN-CNCLADJ - Cancel related adjustments
- To Do Type - External Routing: CI_ADJAPPEML - Create Email For Adjustment Approval
- Write Off Control - WO Large Credit A/P: WO A/P ADJ - Create A/P adjustments for large amts
- Adjustment Type

- Adjustment Type Profile
- Adjustment Cancel Reason
- SA Type
- Service Credit Event Type
- To Do Role
- To Do Type
- Write Off Control

Business Objects

- C1-Adjustment - Adjustment - Read Main Details
- C1-AdjustmentApprovalProfile - Adjustment Approval Profile
- C1-AdjustmentApprovalRequest - Adjustment Approval Request
- C1-AdjustmentType - Adjustment Type - Main Details

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
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data