

**Oracle Utilities Customer Self Service
Release 2.1.0**

Utility Reference Model

3.3.2.3 OUCSS-CCB Stop a Premise-Based Service

May 2016

Oracle Utilities Customer Self Service Release 2.1.0 Utility Reference Model 3.3.2.3 OUCSS-CCB Stop a Premise-Based Service

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3.3.2.3 OUCSS-CCB Stop a Premise-Based Service

This section provides a brief description of the “OUCSS-CCB Stop a Premise-Based Service” business process. This includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1](#)
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Brief Description

Business Process: 3.3.2.3 OUCSS-CCB Stop a Premise-Based Service

Process Type: Sub-Process

Parent Process: 3.3.2 OUCSS-CC&B.Manage Service Agreement

Sibling Processes: n/a

This process takes place when Services (premise-based) have to be stopped for the Customer based on Customer request via self-service. The process allows understanding of relationships between Customer and the Organization who provides the Services that can be stopped.

Actors/Roles

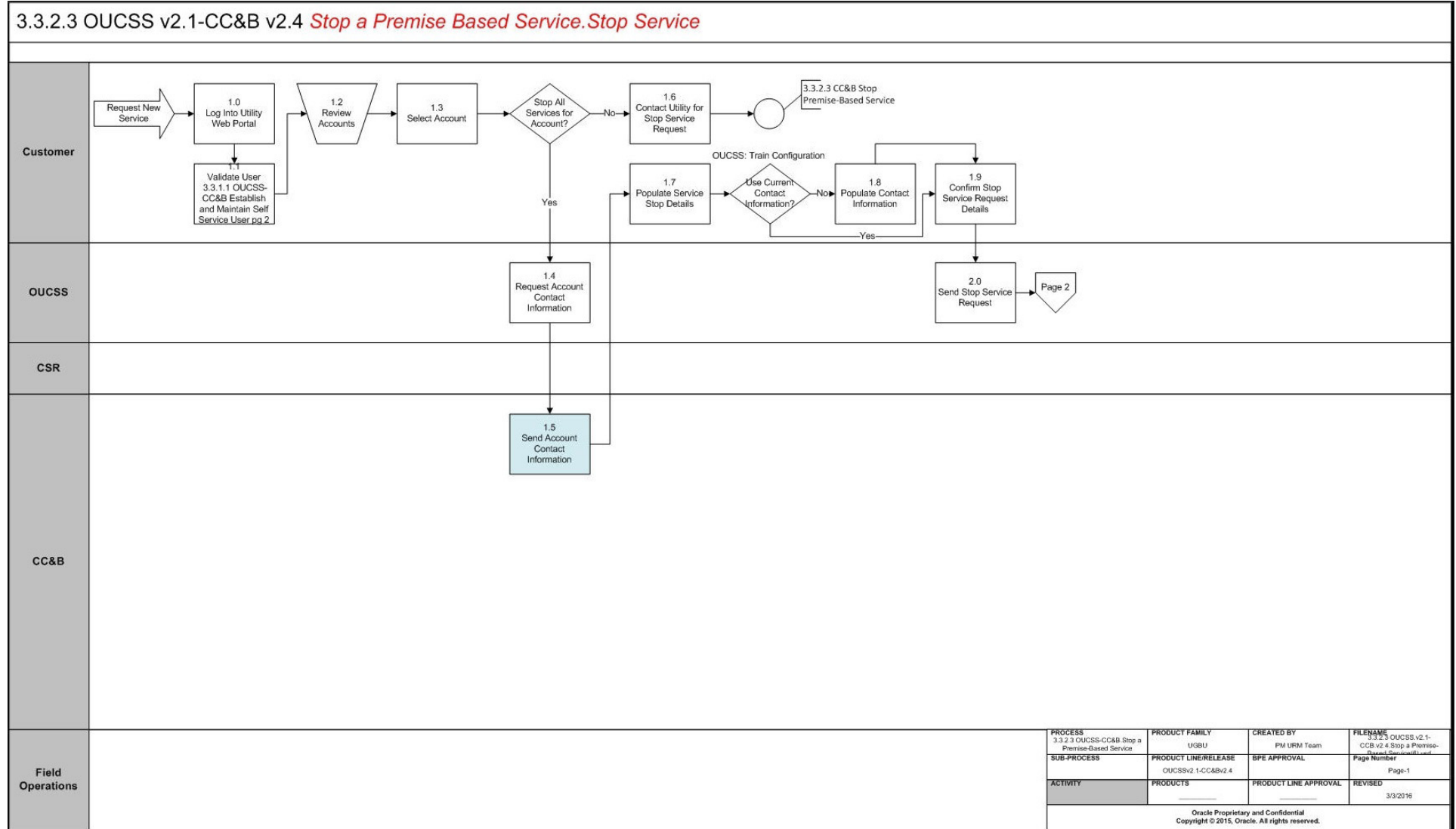
The OUCSS-CCB Stop a Premise-Based Service business process involves the following actors and roles:

- **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.
- **Customer:** The service customer.
- **OUCSS:** The Oracle Utilities Customer Self Service application.

Business Process Diagrams

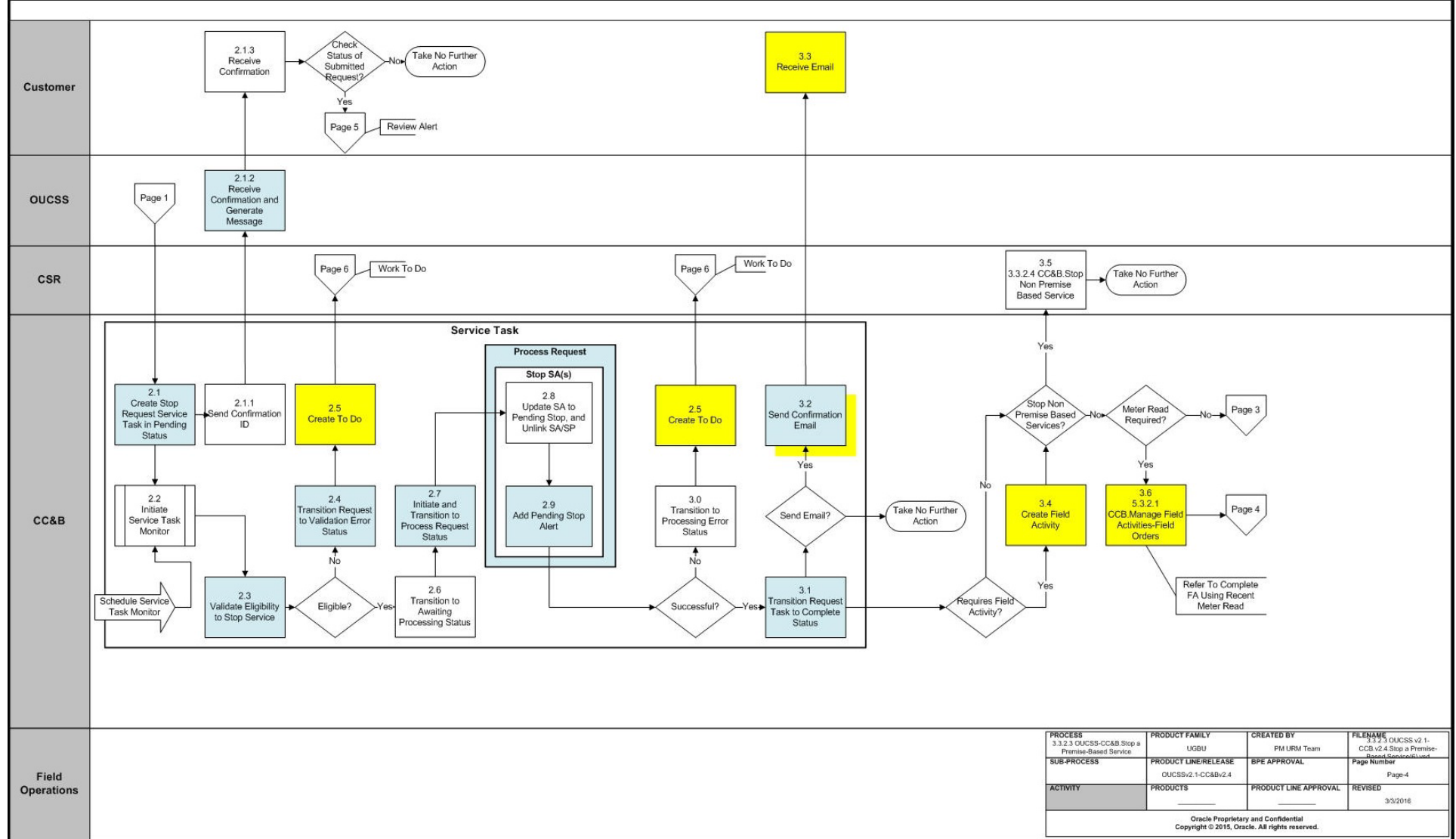
OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1

3.3.2.3 OUCSS v2.1-CC&B v2.4 *Stop a Premise Based Service. Stop Service*



OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2

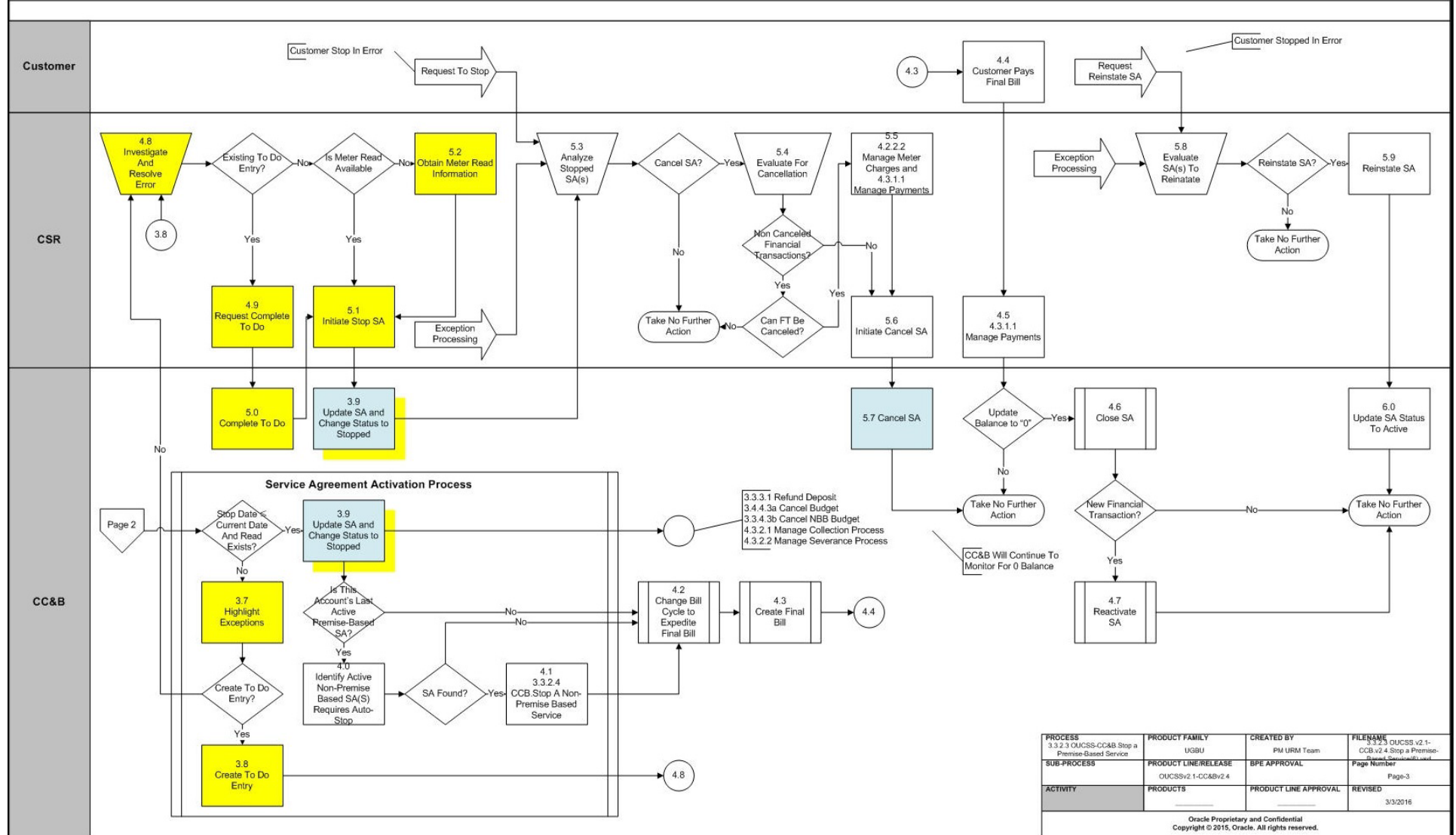
3.3.2.3 OUCSS v2.1-CC&B v2.4 *Stop a Premise Based Service.Stop Service*



PROCESS	3.3.2.3 OUCSS-CC&B Stop a Premise-Based Service	PRODUCT FAMILY	UGBU	CREATED BY	PM URM Team	FILENAME	3.3.2.3 OUCSS v2.1-CC&B v2.4 Stop a Premise-Based Service.docx
SUB-PROCESS		PRODUCT LINE/RELEASE	OUCSSv2.1-CC&Bv2.4	BPE APPROVAL		Page Number	Page-4
ACTIVITY		PRODUCTS		PRODUCT LINE APPROVAL		REVISED	3/3/2016
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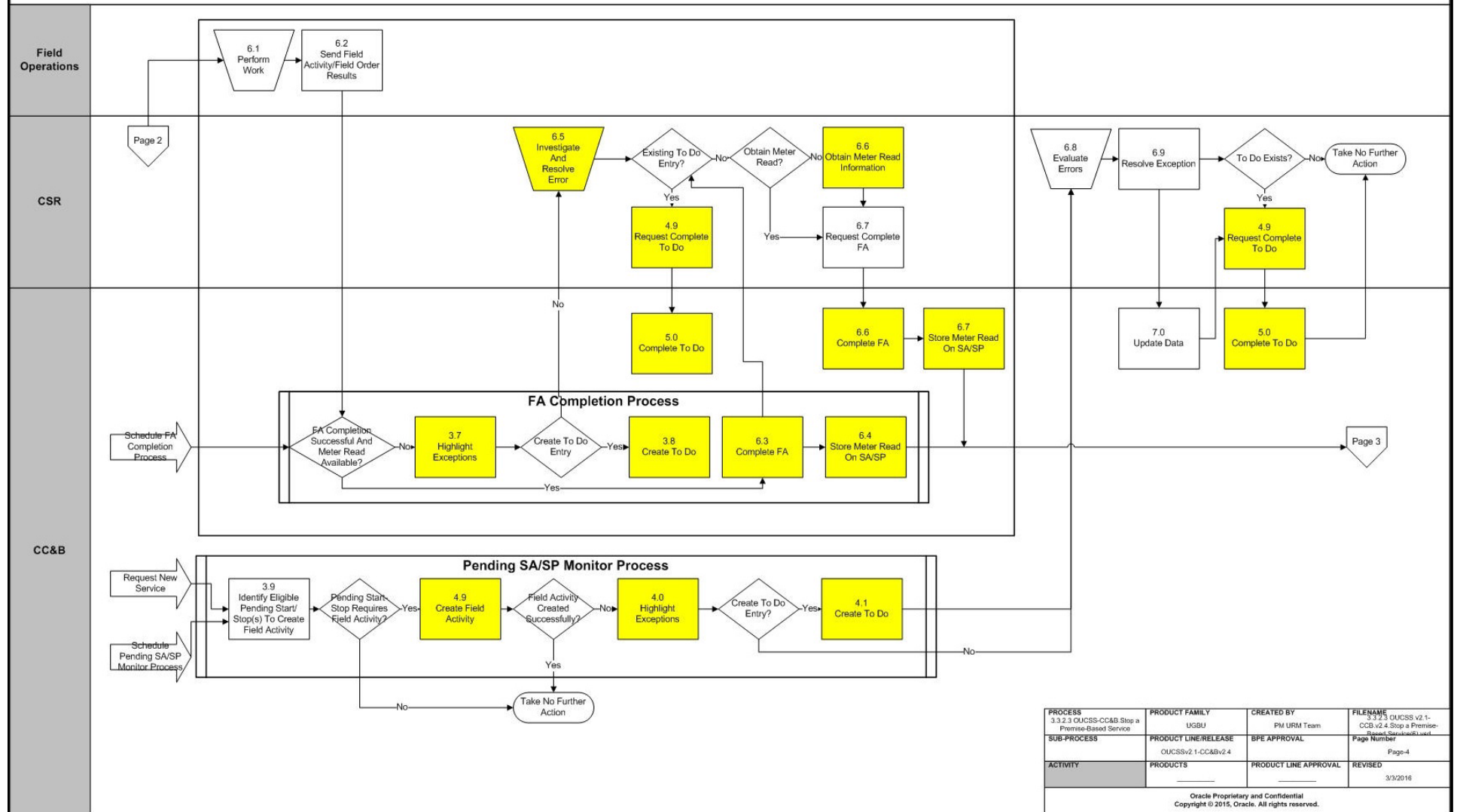
OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3

3.3.2.3 OUCSS v2.1-CC&B v2.4 Stop a Premise Based Service.Stop Service



OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4

3.3.2.3 CC&B v2.3.1 *Start Premise Based Service.Stop Service*

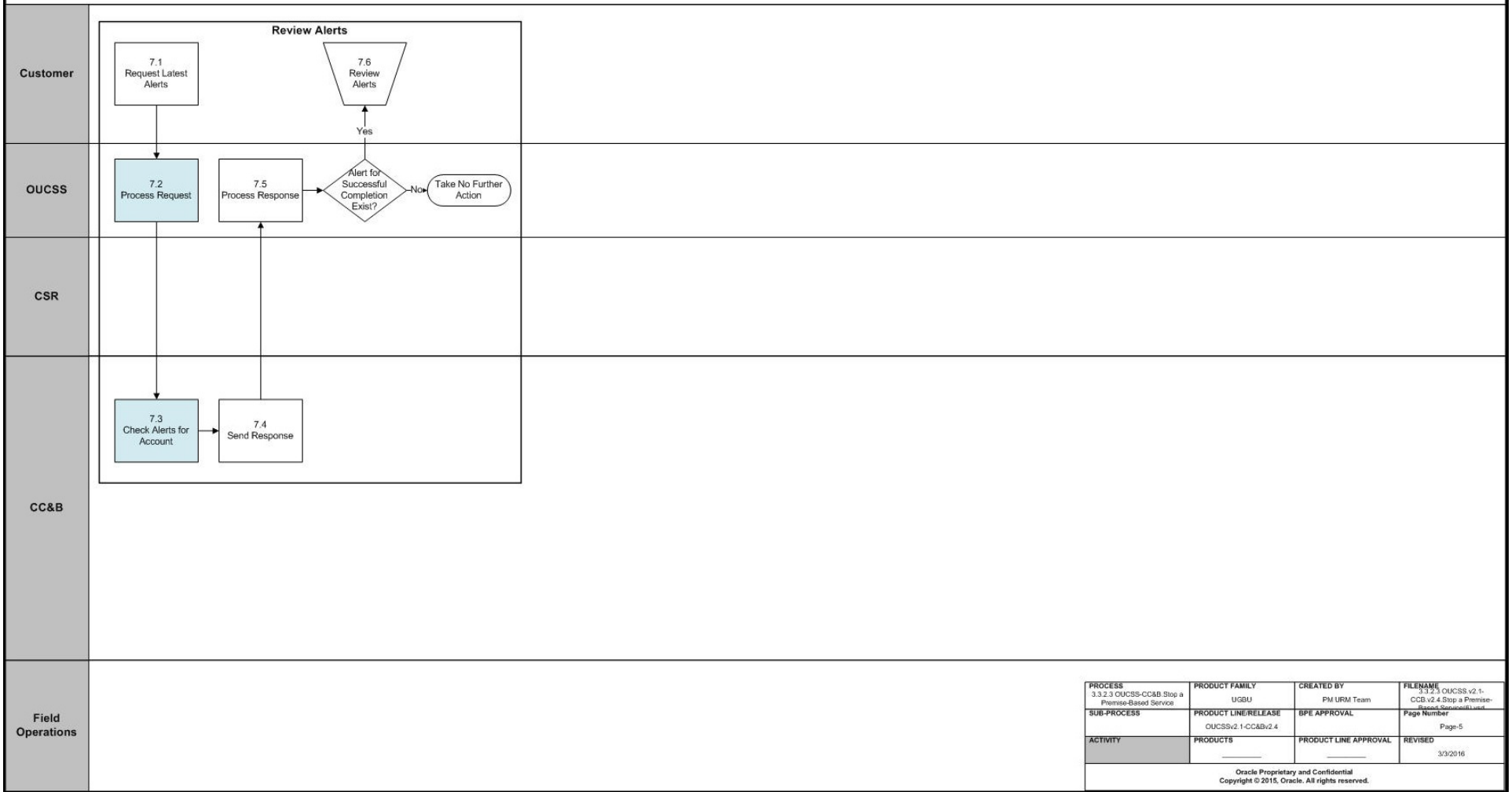


PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
3.3.2.3 OUCSS-CC&B Stop a Premise-Based Service	UGSU	PM URM Team	3.3.2.3 OUCSS v2.1-CC&B v2.4 Stop a Premise-Based Service&Used
SUB-PROCESS	PRODUCT LINE/RELEASE	BPE APPROVAL	Page Number
	OUCSSv2.1-CC&Bv2.4		Page-4
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED
			3/3/2016

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OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5

3.3.2.3 OUCSS v2.1-CC&B v2.4 *Start a Premise Based Service.Review Alerts*



OUCSS-CCB Stop a Premise-Based Service Detailed Process Model Description

This section provides a detailed description of the “OUCSS-CCB Stop a Premise-Based Service” business process, including:

- ♦ 1.0 Log Into Utility Web Portal
- ♦ 1.1 Establish and Maintain Self Service User
- ♦ 1.2 Review Accounts
- ♦ 1.3 Select Account
- ♦ 1.4 Request Account Contact Information
- ♦ 1.5 Send Account Contact Information
- ♦ 1.6 Contact Utility for Stop Service Request
- ♦ 1.7 Populate Service Stop Details
- ♦ 1.8 Populate Contact Information
- ♦ 1.9 Confirm Stop Service Request Details
- ♦ 2.0 Send Stop Service Request
- ♦ 2.1 Create Stop Request Service Task in Pending Status
 - ♦ 2.1.1 Send Confirmation ID
 - ♦ 2.1.2 Receive Confirmation and Generate Message
 - ♦ 2.1.3 Receive Confirmation
- ♦ 2.2 Initiate Service Task Monitor
- ♦ 2.3 Validate Eligibility to Stop Service
- ♦ 2.4 Transition Request to Validation Error Status
- ♦ 2.5 Create To Do
- ♦ 2.6 Transition to Awaiting Process Status
- ♦ 2.7 Initiate and Transition to Process Request Status
- ♦ 2.8 Update SA to Pending Stop and Unlink SA/SP
- ♦ 2.9 Add Pending Stop Alert
- ♦ 3.0 Transition to Processing Error Status
- ♦ 3.1 Transition Request Task to Complete Status
- ♦ 3.2 Send Confirmation Email
- ♦ 3.3 Receive Email
- ♦ 3.4 Create Field Activity
- ♦ 3.5 Start Non Premise Based Service
- ♦ 3.6 Manage Field Activities-Field Orders
- ♦ 3.7 Highlight Exceptions
- ♦ 3.8 Create To Do Entry
- ♦ 3.9 Update SA and Change Status to Stopped
- ♦ 4.0 Identify Active Non-Premise Based SA(s) with Auto-Stop Flag
- ♦ 4.1 Stop a Non-Premise Based Service
- ♦ 4.2 Change Bill Cycle to Expedite Final Bill
- ♦ 4.3 Create Final Bill
- ♦ 4.4 Customer Pays Final Bill
- ♦ 4.5 Manage Payments
- ♦ 4.6 Close SA
- ♦ 4.7 Reactivate SA
- ♦ 4.8 Investigate and Resolve Error
- ♦ 4.9 Request Complete To Do
- ♦ 5.0 Complete To Do Entry
- ♦ 5.1 Initiate Stop SA

- ◆ 5.2 Obtain Meter Read Information
- ◆ 5.3 Analyze Stopped SA
- ◆ 5.4 Evaluate for Cancellation
- ◆ 5.5 Manage Meter Charges and 4.3.1.1 Manage Payments
- ◆ 5.6 Initiate Cancel SA
- ◆ 5.7 Cancel SA
- ◆ 5.8 Evaluate SA to Reinstate
- ◆ 5.9 Reinstate SA
- ◆ 6.0 Update SA Status to Active
- ◆ 6.1 Perform Work
- ◆ 6.2 Send Field Activity/Field Order/ Results
- ◆ 6.3 Complete FA
- ◆ 6.4 Store Meter Read on SA/SP
- ◆ 6.5 Investigate and Resolve Error
- ◆ 6.6 Obtain Meter Read Information
- ◆ 6.7 Request Complete FA
- ◆ 6.8 Evaluate Errors
- ◆ 6.9 Resolve Exception
- ◆ 7.0 Update Data
- ◆ 7.1 Request Latest Alerts
- ◆ 7.2 Process Request
- ◆ 7.3 Check Alerts for Account
- ◆ 7.4 Send Response
- ◆ 7.5 Process Response
- ◆ 7.6 Review Alerts
- ◆ 7.7 Evaluate Error and Work To Do
- ◆ 7.8 Request Discard Task to Start Service
- ◆ 7.9 Transition Service Task to Discard Status
- ◆ 8.0 Request Reprocess Stop Service Task
- ◆ 8.1 Contact Customer
- ◆ 8.2 Provide Additional Details

1.0 Log Into Utility Web Portal

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: User logs into self-service account to access Utility Web Portal.

1.1 Establish and Maintain Self Service User

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: See process 3.3.1.1 OUCSS-CCB.Establish and Maintain Self Service User

1.2 Review Accounts

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews list of account(s) enrolled for self-service access and decides to request a payment arrangement. Selection is made via the navigation menu.

1.3 Select Account

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer selects the account for which they want to request a payment arrangement.

1.4 Request Account Contact Information

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: Application retrieves contact information for Account Holder.

1.5 Send Account Contact Information

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B provides account holder contact information to OUCSS.

Entities to Configure

- XAI Service: WXViewAccount

1.6 Contact Utility for Stop Service Request

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer does not want to stop all services (only some) and contacts the utility directly. Proceed to 3.3.2.3 CC&B.Stop a Premise-Based Service.

1.7 Populate Service Stop Details

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer enters in date for when they want to stop service.

1.8 Populate Contact Information

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer provides contact details necessary to process stop service request.

1.9 Confirm Stop Service Request Details

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews and confirms all details provided for stop service request.

2.0 Send Stop Service Request

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: Send all details provided for stop service request to CC&B for processing.

2.1 Create Stop Request Service Task in Pending Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Create service task for processing Stop Service Request.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

2.1.1 Send Confirmation ID

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Send email to confirming the Stop Service Request was received by the system.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Processes

- XAI Service: WXProcessStartStopRequest

Entities to Configure

- CI_CONFRMEML

2.1.2 Receive Confirmation and Generate Message

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: Application receives service task ID from CC&B and generates message to display to the customer.

2.1.3 Receive Confirmation

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer receives confirmation message in portal.

2.2 Initiate Service Task Monitor

Actor/Role: CC&B

Description: Service Task monitor batch process executes and transitions the service task to the next state.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Processes

- F1-STKDF (Process Name: F1-TRN-DF-NS)
- F1-STKTR (Process Name: F1-TRN-DF-NS)

2.3 Validate Eligibility to Stop Service

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Validate Stop Service Request details for automated processing. Base validation is that active SAs must exist for the premise.

Available Algorithms

- C1-VASTSTPRQ

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

2.4 Transition Request to Validation Error Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Transition Service Task to Validation Error status.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

2.5 Create To Do

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Create a To Do for customer service representative to process exception.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- To Do Role
- To Do Type
- XAI Service: WXProcessStartStopRequest

2.6 Transition to Awaiting Process Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Continue processing Stop Service Request and transition to Awaiting Processing status.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

2.7 Initiate and Transition to Process Request Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Initiate processing of Stop Service Request process and transition to Process Request Status.

2.8 Update SA to Pending Stop and Unlink SA/SP

Group: Stop SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

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.

2.9 Add Pending Stop Alert

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group: Add Pending Stop Alert

Actor/Role: CC&B

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

Available Algorithms

- Installation Options Control Central Alert Algorithms

Entities to Configure

- Installation Options

3.0 Transition to Processing Error Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Transition service task to Processing Error status.

3.1 Transition Request Task to Complete Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Transition service task to Complete status.

3.2 Send Confirmation Email

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Send customer email to confirm that stop service is completed.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

Processes

- CI_CONFRMEML

3.3 Receive Email

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer receives email with confirmation.

3.4 Create Field Activity

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Create field activity to complete Stop Service process.

3.5 Start Non Premise Based Service

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Customer

Description: See process 3.3.2.4 CC&B.Stop Non Premise Based Service

3.6 Manage Field Activities-Field Orders

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: See process 5.3.2.1 CCB.Manage Field Activities – Field Orders

3.7 Highlight Exceptions

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Groups:

- Service Agreement Activation Process
- FA Completion Process

- 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.

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.

Entities to Configure

- To Do Role
- To Do Type

3.8 Create To Do Entry

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Groups:

- Service Agreement Activation Process
- Field Activity /Field Order Completion Process
- 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.

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.

Entities to Configure

- To Do Role
- To Do Type

3.9 Update SA and Change Status to Stopped

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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.

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).

Processes

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

Entities to Configure

- SA Type

4.0 Identify Active Non-Premise Based SA(s) with Auto-Stop Flag

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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

Processes

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

Entities to Configure

- SA Type

4.1 Stop a Non-Premise Based Service

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer needs to stop non-premise based services on the account. Proceed to 3.3.2.4 CC&B.Stop a Non-Premise-Based Service.

4.2 Change Bill Cycle to Expedite Final Bill

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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.

4.3 Create Final Bill

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

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

Available Algorithms

- 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

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

Entities to Configure

- Bill Cycle, Bill Segment Type, Customer Class, Installation Options – Billing, SA Type

4.4 Customer Pays Final Bill

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: Customer

Description: The Customer receives and pays the final bill.

4.5 Manage Payments

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User enters the payment in CC&B. Refer to 4.3.1.1 CC&B.Manage Payments.

4.6 Close SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Service Agreement is automatically transitioned to Closed Status when the balance is "0".

4.7 Reactivate SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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.

4.8 Investigate and Resolve Error

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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.

4.9 Request Complete To Do

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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 Role
- To Do Type

5.0 Complete To Do Entry

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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 Role
- To Do Type

5.1 Initiate Stop SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

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

5.2 Obtain Meter Read Information

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

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

5.3 Analyze Stopped SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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.

5.4 Evaluate for Cancellation

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: As part of the cancellation process it is determined there are Financial Transactions associated with the Service Agreement.

5.5 Manage Meter Charges and 4.3.1.1 Manage Payments

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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 CCB.Manage Meter Charges and 4.3.1.1 CCB.Manage Payments.

Entities to Configure

- Cancel Reason – for Bill, Payment or Adjustment

5.6 Initiate Cancel SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

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

5.7 Cancel SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Service Agreement is transitioned to a canceled status. Canceled is a final status.

Available Algorithms

- SACA CRTTODO – Create To Do Entry when SA Canceled

Entities to Configure

- To Do Role
- To Do Type

5.8 Evaluate SA to Reinstate

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User reviews and gathers available information to reinstate SA.

5.9 Reinstate SA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User initiates the Reinstate SA function.

6.0 Update SA Status to Active

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

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.

6.1 Perform Work

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: Field Operations

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

6.2 Send Field Activity/Field Order/ Results

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

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 CC&B.Manage Field Activities and Field Orders, 4.2.1.1a CC&B.Read Meters and 4.2.1.2a CC&B.Load Meter Reads.

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

6.3 Complete FA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly

before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

Available Algorithms

- SA Type - SASP FW Creation SASP FW CRE – Create Field Activity – Check for Meter Read and Back to Back
- Installation Options FAIN-INFO – Field Activity Information
- FAAD-INFO – Field Activity Additional Information
- OFSDGRP DFLT 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

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

Entities to Configure

- FA Types
- FA Type Profiles
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control

6.4 Store Meter Read on SA/SP

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CC&B

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

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

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

6.5 Investigate and Resolve Error

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

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

6.6 Obtain Meter Read Information

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

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.

6.7 Request Complete FA

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

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

6.8 Evaluate Errors

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

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

6.9 Resolve Exception

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

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

7.0 Update Data

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CC&B

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

7.1 Request Latest Alerts

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer requests the latest alerts from OUCSS portal.

7.2 Process Request

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS requests alerts from all of the different edge applications (CC&B, MDM, NMS).

Entities to Configure

- BPEL: OUCSSGetAlertsEBF

7.3 Check Alerts for Account

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B provides alerts for the specific account to OUCSS to render and display to the user.

Entities to Configure

- XAI Service: WXGetCCBAlerts

7.4 Send Response

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Send Alert information to OUCSS to render and display to the user.

7.5 Process Response

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS processes the alerts from CC&B and presents them to the user.

7.6 Review Alerts

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews alerts in OUCSS Portal.

7.7 Evaluate Error and Work To Do

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR evaluates the To Do and begins working on it.

7.8 Request Discard Task to Start Service

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR

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

7.9 Transition Service Task to Discard Status

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Transition service task to discard status.

8.0 Request Reprocess Stop Service Task

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR

Description: If the background process creates a To Do Entry, the CSR or Authorized User marks the Service Task as Process Request and requests completion of the To Do Entry. The CSR or Authorized User may add comments or a log entry for future reference.

8.1 Contact Customer

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR

Description: See process 3.4.1.1 CC&B.Manage Customer Contacts.

8.2 Provide Additional Details

Reference: [OUCSS-CCB Stop a Premise-Based Service Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer provides CSR with additional details for the service request.