

C2M.CCB 2.6

4.2.2.8 Manage Billing Disputes

Creation Date: June 8, 2009

Last Updated: February 16, 2018

ORACLE[®]

Copyright © 2017, Oracle. All rights reserved.

This document is provided for information purposes only and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission. Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

BRIEF DESCRIPTION	4
BUSINESS PROCESS MODEL PAGE 1	5
BUSINESS PROCESS MODEL PAGE 2	6
BUSINESS PROCESS MODEL PAGE 3	7
DETAIL BUSINESS PROCESS MODEL DESCRIPTION.....	8
TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS.....	14
DOCUMENT CONTROL	15
ATTACHMENTS:.....	16
<i>Control Central Search</i>	16
<i>Account Financial History.....</i>	16
<i>SA Billing History</i>	16
<i>Dashboard.....</i>	16
<i>360 View</i>	16
<i>Account C&C – Postpone Credit Review.....</i>	17

Brief Description

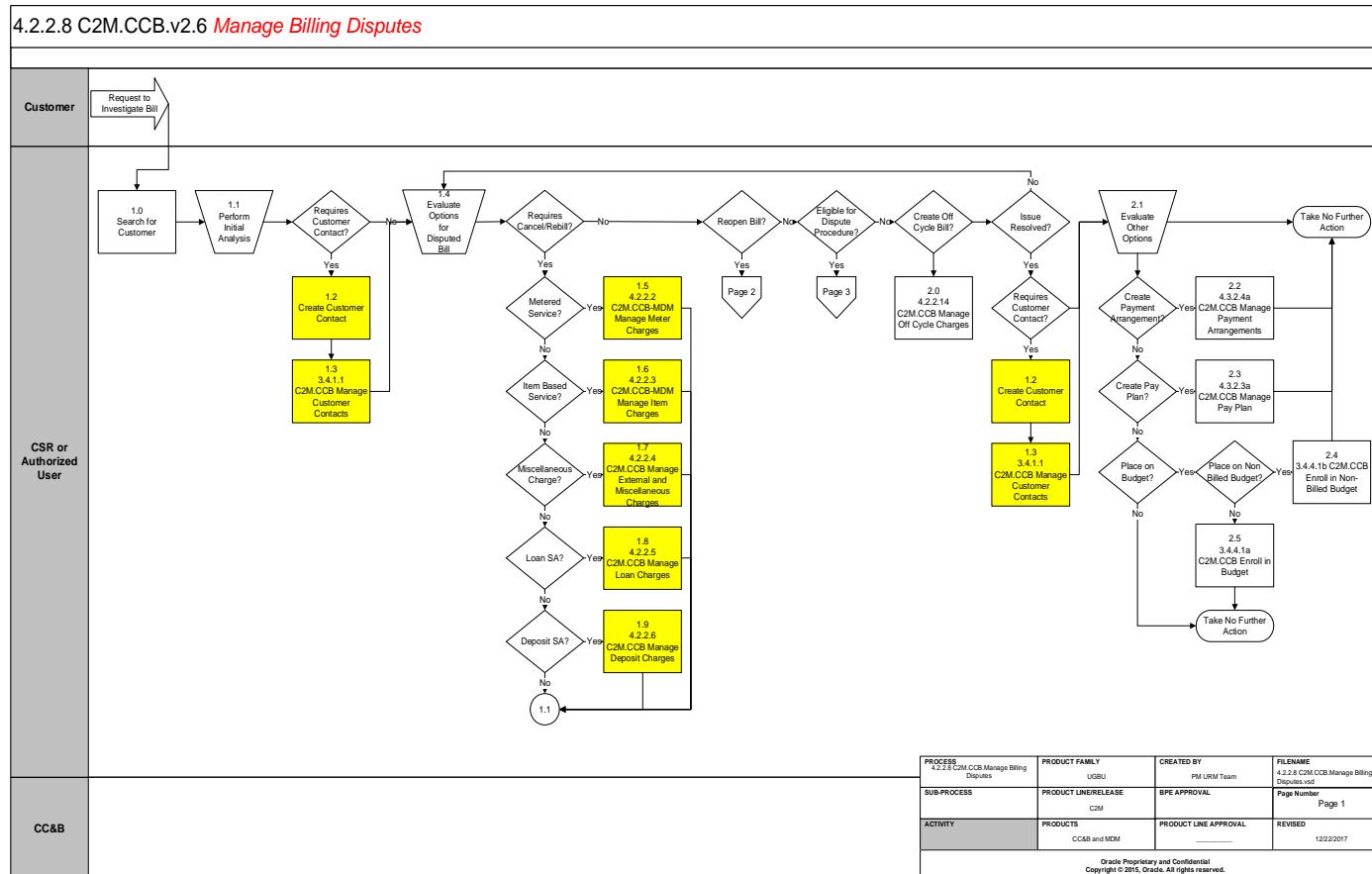
Business Process:	4.2.2.8 C2M.CCB.Manage Billing Disputes
Process Type:	Sub Process
Parent Process:	4.2.2 C2M.CCB.Manage Bill
Sibling Processes:	3.4.1.1 C2M.CCB. Manage Customer Contacts, 4.2.2.2 C2M.CCB-MDM Manage Meter Charges, 4.2.2.3 C2M.CCB-MDM Manage Item Charges, 4.2.2.4 C2M.CCB Manage External and Miscellaneous Charges, 4.2.2.5 C2M.CCB Manage Loan Charges, 4.2.2.6 C2M.CCB Manage Deposit Charges, 4.2.2.14 C2M.CCB Manage Off Cycle Charges, 4.3.2.4a C2M.CCB Manage Payment Arrangements, 4.3.2.3a C2M.CCB Manage Pay Plan, 3.4.4.1b C2M.CCB Enroll in Non-Billed Budget, 3.4.4.1b 3.4.4.1a C2M.CCB Enroll in Budget,

This process describes alternatives for managing tracking and resolution of a customer disputed bill in C2M.CCB. To resolve a disputed bill or charges in question, the CSR or Authorized may make use of the following options in base C2M.CCB:

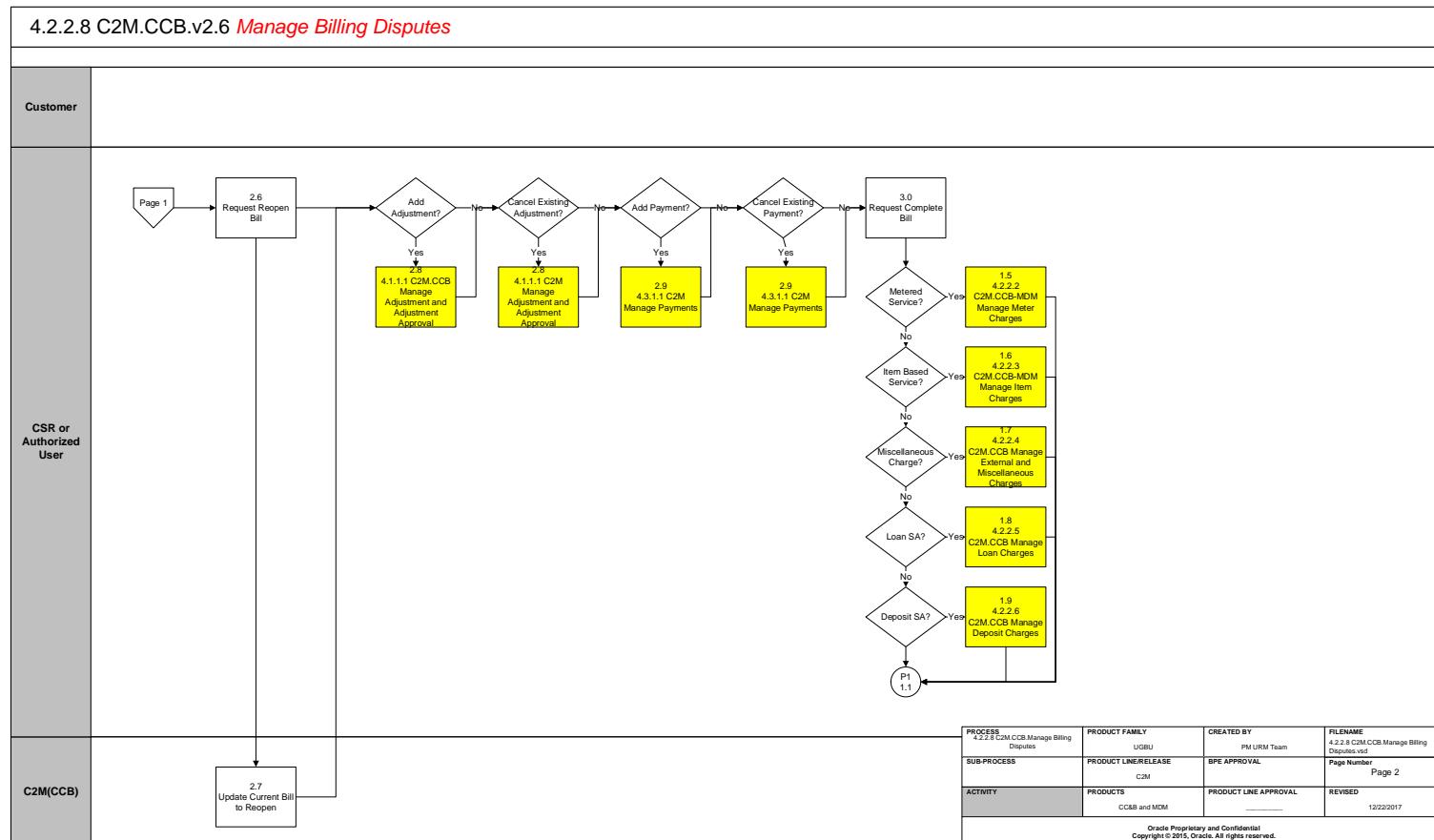
- Cancel/Rebill
- Reopening of current Bill
- Off Cycle Billing
- Pay Plans
- Payment Arrangements
- Budget Plans
- Protect Account against Credit and Collection Review while dispute is in progress
- Transfer disputed amounts to a separate SA while dispute is in progress
- Record interaction with customer through Customer Contacts and automatic reminders for follow up

In addition, an organization may use a C2M tool, “Case Management” functionality to further track and document the details of a disputed amount with the customer. Case Management allows for lifecycle statuses as the disputes moves through resolution. The lifecycle statuses provide visibility across users in C2M.CCB-MDM. This is considered custom configuration to be developed by the individual organization. C2M.CCB documentation is available as a guide for developing this functionality.

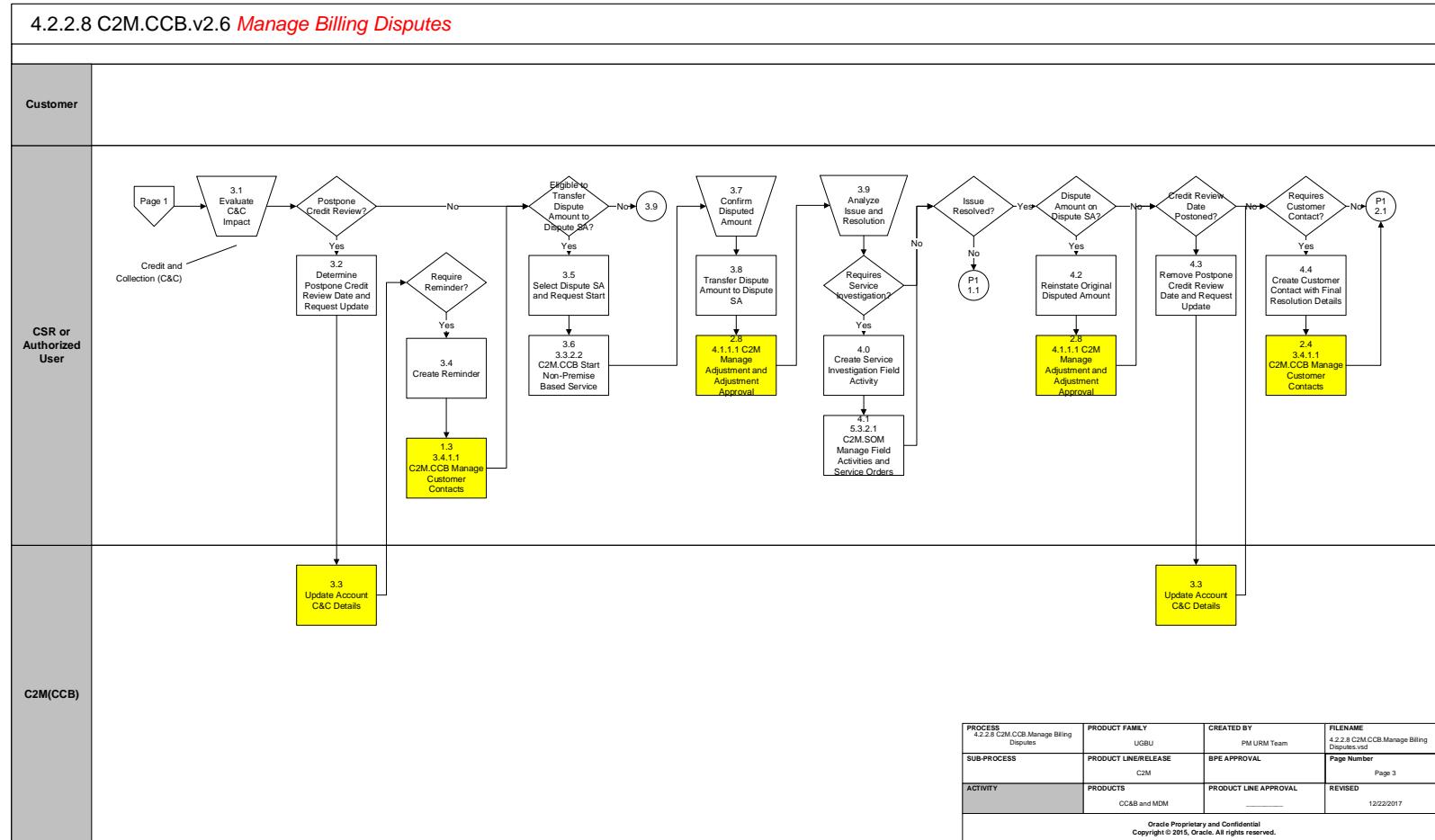
Business Process Model Page 1



Business Process Model Page 2



Business Process Model Page 3



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

Upon receipt of a customer inquiry for a disputed bill, the CSR or Authorized User accesses [Control Central Search](#) to locate the customer in C2M(CCB).

Configuration required Y

Entities to Configure:

Installation Options – Installation Options Framework

1.1 Perform Initial Analysis

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User performs an initial, overall analysis of the Account. Typically, there are established guidelines and business rules for analyzing the disputed amount. There may be a checklist for discussion with the customer. Areas of C2M.CCB-MDM are reviewed and may include: [Account Financial History](#), [Billing History](#), [360 View for Service Point, Usage and Device History](#), Account Activity, Field Activity and Service Order information.

1.2 Create Customer Contact

Actor/Role: CSR or Authorized User

Description:

Most organization routinely document interaction with the customer. The CSR or Authorized User follows established business rules and documents the interaction with the customer through a Customer Contact.

1.3 3.4.1.1 C2M.CCB Manage Customer Contacts

Actor/Role: CSR or Authorized User

Description:

Refer to 3.4.1.1 C2M.CCB Manage Customer Contacts for detailed procedures.

1.4 Evaluate Options for Disputed Bill

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User considers options for working through the disputed bill and attempting to resolve the disputed amount with the customer. Each organization has established business rules as well as potential governmental regulations. The options will vary dependent on each customer scenario.

1.5 4.2.2.2 C2M.CCB-MDM Manage Meter Charges

Actor/Role: CSR or Authorized User

Description: If cancel rebill is required on a metered service SA, the CSR or Authorized User initiates cancel/rebill. **Refer to 4.2.2.2 C2M.CCB-MDM Manage Meter Charges.**

1.6 4.2.2.3 C2M.CCB-MDM Manage Item Charges

Actor/Role: CSR or Authorized User

Description: If cancel rebill is required on an itemed service SA, the CSR or Authorized User initiates cancel/rebill. **Refer to 4.2.2.3 C2M.CCB-MDM Manage Item Charges.**

1.7 4.2.2.4 C2M.CCB Manage External and Miscellaneous Charges

Actor/Role: CSR or Authorized User

Description: If cancel rebill is required on external and miscellaneous charges, the CSR or Authorized User initiates cancel/rebill. **Refer to 4.2.2.4 C2M.CCB Manage External and Miscellaneous Charges.**

1.8 4.2.2.5 C2M.CCB Manage Loan Charges

Actor/Role: CSR or Authorized User

Description: If cancel rebill is required on a loan SA, the CSR or Authorized User initiates cancel/rebill. **Refer to 4.2.2.5 C2M.CCB Manage Loan Charges.**

1.9 4.2.2.6 C2M.CCB Manage Deposit Charges

Actor/Role: CSR or Authorized User

Description: If cancel rebill is required on a deposit SA, the CSR or Authorized User initiates cancel/rebill. **Refer to 4.2.2.6 C2M.CCB Manage Deposit Charges.**

2.0 4.2.2.14 C2M.CCB Manage Off Cycle Charges

Actor/Role: CSR or Authorized User

Description:

If an off-cycle bill is required, the CSR or Authorized User may initiate an off-cycle bill to include specific changes for the Account's financial balance. **Refer to 4.2.2.14 C2M.CCB Manage Off Cycle Charges.**

2.1 Evaluate Other Options

Actor/Role: CSR or Authorized User

Description:

Dependent on investigative results and dispute resolution, the CSR or Authorized User may offer the customer an option to enter into a Payment Arrangement, Pay Plan or Budget Plan. Each of these options requires consideration within established business rules.

2.2 4.3.2.4a C2M.CCB Manage Payment Arrangements

Actor/Role: CSR or Authorized User

Description:

If the customer is eligible for Payment Arrangements, refer to 4.3.2.4a C2M.CCB Manage Payment Arrangements.

2.3 4.3.2.3a C2M.CCB Manage Pay Plan

Actor/Role: CSR or Authorized User

Description:

If the customer is eligible for a Pay Plan, refer to 4.3.2.3a C2M.CCB Manage Pay Plan.

2.4 3.4.4.1b C2M.CCB Enroll in Non-Billed Budget

Actor/Role: CSR or Authorized User

Description:

If the customer is eligible for Budget Billing using Non-Billed Budget options, refer to 3.4.4.1b C2M.CCB Enroll in Non-Billed Budget.

2.5 3.4.4.1a C2M.CCB Enroll in Budget

Actor/Role: CSR or Authorized User

Description: If ... Refer to 3.4.4.1b 3.4.4.1a C2M.CCB Enroll in Budget.

2.6 Request Reopen Bill

Actor/Role: CSR or Authorized User

Description:

Resolution may include reopening of the current bill. The reopening of the bill allows for adjustments, payments and rebilling to reflect the financial impact on the current bill.

2.7 Update Current Bill to Reopen

Actor/Role: C2M(CCB)

Description:

The current bill is reopened in C2M.CCB.

2.8 4.1.1.1 C2M.CCB Manage Adjustment and Adjustment Approval

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User determines if an adjustment should be added or canceled for the Account's Service Agreement(s).

2.9 4.3.1.1 C2M.CCB Manage Payments

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User determines if a Payment should be added or canceled for the Account's Service Agreement(s). Redistribution of a payment may be considered.

3.0 Request Complete Bill

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized requests to complete the reopened bill. Refer to the specific C2M billing processes.

3.1 Evaluate C&C Impact

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User considers potential Credit and Collection impacts for the customer's Account. Typically, there is further discussion with the customer. Based on established business rules, the CSR or Authorized User may temporarily protect the Account from Credit and Collection processing using the Postpone Review functionality.

3.2 Determine Postpone Credit Review Date and Request Update

Actor/Role: CSR or Authorized User

Description: CSR or Authorized User updates the [Postpone Credit Review Until Date](#) on the Account record. Credit and Collection information is on the C&C tab for the Account record.

3.3 Update Account C&C Details

Actor/Role: C2M(CCB)

Description:

The Account record is updated with the changes for Credit and Collection in C2M.CCB.

3.4 Create Reminder**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User makes use of the [Customer Contact reminder](#) functionality. A reminder can be created for today or a future date. This functionality is used in conjunction with a specific To Do Type, To Do Roles, and background processing. Refer to 3.4.1.1 C2M.CCB Manage Customer Contact for further details.

3.5 Select Dispute SA and Request Start**Actor/Role:** CSR or Authorized User**Description:**

At times, it may be necessary to transfer monies to a separate Service Agreement while the dispute is in progress. This Service Agreement Type requires configuration that meets the individual organization's business rules. This configuration may include a Dashboard Alert.

Configuration required Y**Entities to Configure:**

SA Type and all associated configuration

3.6 3.3.2.2 C2M.CCB Start Non-Premise Based Service**Actor/Role:** CSR or Authorized User**Description:**

The dispute Service Agreement Type is typically configured as Non-Premise based. Refer to 3.3.2.2 C2M.CCB Start Non-Premise Based Service for details starting a Non-Premise based Service Agreement.

3.7 Confirm Disputed Amount**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User again reviews and confirms the disputed amount.

3.8 Transfer Dispute Amount to Dispute SA**Actor/Role:** CSR or Authorized User**Description:**

Using a specific Adjustment Type for transfers, the CSR or Authorized User shifts the disputed amount from the original Service Agreement to a separate Dispute Service Agreement.

3.9 Analyze Issue and Resolution

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User again considers the overall resolution decision to date, and may have further interaction with the customer. Final resolution may require escalation or further investigation based on business rules or regulatory considerations.

4.0 Create Service Investigation Field Activity

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User creates a Field Activity for an actual onsite investigation of the Device and Service Point.

4.1 5.3.2.1 C2M.SOM Manage Field Activities and Service Orders

Actor/Role: CSR or Authorized User

Description:

Refer to 5.3.2.1 C2M.SOM Manage Field Activities and Field Orders for the Field Activity lifecycle.

4.2 Reinstate Original Disputed Amount

Actor/Role: CSR or Authorized User

Description:

Once the issue is resolved, the disputed amount is moved back to the original Service Agreement. This can be done through a separate transfer Adjustment or cancellation of the existing Adjustment.

4.3 Remove Postpone Credit Review Date and Request Update

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User removes the Credit Review Date to allow for normal Credit and Collection processing. Business rules dictate when this date should be removed.

4.4 Create Customer Contact with Final Resolution Details

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User creates a separate Customer Contact with the final resolution for the disputed amount. Alternately an existing Customer Contact may be updated with a log entry. Refer to 3.4.1.1 C2M.CCB Manage Customer Contacts.

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
6/8/09	Colleen King	Draft	No Previous Document
6/9/09	Colleen King		Updates from Review
6/10/09	Colleen King		Updates from Review
6/15/09	Colleen King		Updates from Review
6/17/09	Colleen King		Updates from Review for 4.2.2.2 applicable to this process
10/21/10	Geir Hedman		Updated Title and Content page
11/24/10	Yoko Iwahiro		Framework updates.
12/27/10	Ayelet Lavee		Release review made changes to sibling process, hyperlinks, Minor editing
2/9/11	Geir Hedman		Updated Document and Visio
3/28/2011	Conrad Pinili		Updated document - Process Plug-Ins
9/19/13	Becky Ray		Updated document for v2.4
9/24/2013	Dean Davis		Updated document for v2.4
09/30/2013	Galina Polonsky		Reviewed, Approved
08/29/2017	Joshua Piccott		Updated document for C2M CCB v2.6
12/18/2017	Jeffrey Yoong		Updated document and Visio
12/22/2017	Colleen King		Updated document and Visio
12/23/2017	Galina Polonsky		Reviewed, Approved

Attachments:

Control Central Search



Control Central
Search.doc

Account Financial History



Account Financial
History.doc

SA Billing History



SA Billing History.doc

Dashboard



Dashboard-Payment
Arrangement Alert.do

360 View



360 View.docx

Account C&C - Postpone Credit Review



Account Postpone
Credit Review.doc

Customer Contact Reminder



Customer Contact
Reminder.doc