

Oracle® Revenue Management and Billing

Version 2.7.0.0.0

Release Notes

Revision 1.10

E95806-01

May, 2018

Oracle Revenue Management and Billing Version 2.7.0.0.0 Release Notes

E95806-01

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About this Document

This document describes the new features, enhancements, UI and database level changes, supported platforms, framework upgrade, supported upgrades, and technology upgrade made in this release. It also highlights the discontinued features, bug fixes, and known issues in this release.

This document does not describe the functionality of Oracle Revenue Management and Billing or technical know-how on how to install or upgrade Oracle Revenue Management and Billing. For more detailed information, you can refer to the following documents:

Document	Description
<i>Oracle Revenue Management and Billing Banking User Guide</i>	Lists and describes various banking features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
<i>Oracle Revenue Management and Billing Insurance User Guide</i>	Lists and describes various insurance features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
<i>Oracle Revenue Management and Billing Installation Guide</i>	Lists the application server pre-requisites, supported platforms, and software and hardware requirements for installing the Oracle Revenue Management and Billing application. It explains how to install the Oracle Revenue Management and Billing application.
<i>Oracle Revenue Management and Billing Quick Installation Guide</i>	Provides high-level information on how to install the Oracle Revenue Management and Billing (ORMB) application and selected additional software.
<i>Oracle Revenue Management and Billing Database Administrator's Guide</i>	Provides information about the Oracle Database Server and Client required for installing the Oracle Revenue Management and Billing database. It explains how to install database with and without demo data. It provides database configuration guidelines including recommended settings for the Oracle Exadata Database machine.
<i>Oracle Revenue Management and Billing Server Administration Guide</i>	Explains the Oracle Revenue Management and Billing (ORMB) architecture and technical know-how required for configuring and using the ORMB application. It explains how to configure and deploy web and business application servers. In addition, it explains how to monitor client machines, web and/or business application servers, and database connections.

Document	Description
<i>Oracle Revenue Management and Billing Security Guide</i>	Lists the security features available in the Oracle Revenue Management and Billing application. It explains how to configure security for the Oracle Revenue Management and Billing application using the default security features.
<i>ORMB - Transaction Feed Management - Batch Execution Guide</i>	Describes the sequence in which the batches must be executed while performing various tasks in the Transaction Feed Management module.
<i>Oracle Revenue Management and Billing Batch Guide</i>	Lists and describes various ORMB batches.
<i>Oracle Revenue Management and Billing Upgrade Guide</i>	Explains how to upgrade the Oracle Revenue Management and Billing framework, application, and its database.
<i>Oracle Revenue Management and Billing Upgrade Path Guide</i>	Explains the path and pre-requisites for upgrading Oracle Revenue Management and Billing from one version to another.
<i>Oracle Revenue Management and Billing Pricing Services</i>	Lists and describes the inbound web services related to the Pricing module. It also explains the pre-requisites, input parameters, and output parameters of these inbound web services.

Change Log

Revision	Last Update	Updated Section	Comments
1.1	01-Jun-2018	Customer Management	Updated Information
		Administrative Services Only (ASO) Policy	Updated Information
		Transaction Feed Management	Updated Information
1.2	11-Jun-2018	Subscription Billing	Updated Information
		Administrative Services Only (ASO) Pricing	Updated Information
		Deprecation Planned for Future Releases	Updated Information
		Known Issues	Removed a known issue from the Banking section
1.3	08-Oct-2018	Overdue Processing	Added Section
1.4	26-Oct-2018	Transaction Feed Management	Added Information
		Deprecation Planned for Future Releases	Updated Information
1.5	05-Mar-2019	Extendable Lookups	Updated Information

Revision	Last Update	Updated Section	Comments
		Administrative Services Only (ASO) Billing	Updated Information
		Transaction Feed Management	Updated Information
1.6	16-Apr-2019	Extendable Lookups	Updated Information
		Claim Pricing	Updated Information
1.7	19-Apr-2019	Claim Pricing	Updated Information
1.8	25-Sep-2019	Deprecation Notices for ORMB Version 2.7.0.0.0	Added Information
1.9	04-Mar-2020	Deprecation Notices for ORMB Version 2.7.0.0.0	Added Information
1.10	15-May-2020	Deprecation Notices for ORMB Version 2.7.0.0.0	Updated Information

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Prerequisites

If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 2.7.0.0.0, then the customer needs to ensure the following (before upgrading):

- All bills generated in the system are in the **Complete** status. In other words, there should not be any bills in the **Pending** status. If there are any bills in the **Pending** status or if any billable charge (generated through TFM) is not yet billed, disaggregation and cancellation of transactions which are uploaded using 2.6.0.1.0 will not happen successfully.
- Transactions which are uploaded using 2.6.0.1.0 must not be in the **Initial Product Determined (INPD)** status. They can be in the **Uploaded (UPLD)**, **Invalid (INVL)**, **Error (EROR)**, **Completed (COMP)**, or **Cancelled (CNCL)** status.
- Equal to (=) or tilde (~) symbol is not used in any existing price item parameter code or value. Otherwise, erroneous results might occur.

New Features (Generic)

This section describes the following new features added in this release which can be used in both financial services and insurance domains:

- Garbling Customer Information

Garbling Customer Information

Oracle Revenue Management and Billing enables you to garble the personal information of a customer, such as the customer name, address, email ID, social security number or any other identifier, birth date, gender, and so on. On receiving the data erasure request from a customer, the data controller will garble the personal information of the customer by masking the data with random characters and then cease the access to the customer records.

To garble the information of one or more persons, you need to do the following:

- Define the **Garble Data (C1-GRBL)** characteristic for each person whose data needs to be garbled and set its value to **Y**.
- Execute the **Garble Person Information (C1-GRBPI)** batch. For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

On executing the **Garble Person Information (C1-GRBPI)** batch, the system identifies the persons where the **Garble Data (C1-GRBL)** characteristic is set to **Y** and the **Garbling Completed (C1-GBCM)** characteristic is either not defined or set to **N**. Note that the system considers the **Garble Data (C1-GRBL)** characteristic value which is effective on the batch business date.

Once the persons are identified, the data in the following fields is masked with random characters across all records in the system:

- ACCOUNT_NBR
- ACCT_NBR
- ADDRESS1
- ADDRESS1_UPR
- ADDRESS2
- ADDRESS3
- ADDRESS4
- BIRTH_DT
- BROKER_NAME
- CITY
- COUNTRY
- COUNTY
- CUSTOMER_NAME
- EMAILID

- ENTITY_NAME
- ENTITY_NAME1
- ENTITY_NAME2
- ENTITY_NAME3
- GEO_CODE
- HOUSE_TYPE
- IN_CITY_LIMIT
- NAME1
- OVRD_MAIL_NAME1
- OVRD_MAIL_NAME2
- OVRD_MAIL_NAME3
- PER_ID_NBR
- PHONE
- POSTAL
- POSTAL_UPR
- STATE

In other words, the personal and account related information of a customer is garbled across the system. In addition, this batch allows you to garble the required characteristics and identifiers of a person and account.

Note: An account may have one or more persons linked to it. The information of an account is garbled only when the data erasure request is received for the main customer of the account.

Once the personal and account related information of a customer is garbled, the access group of the person is changed to **C1GB** (which does not have any data access role). This ensures that the data of the person and his or her accounts cannot be accessed from any screens in the system. If an approval transaction contains personal and account related information of a customer, you cannot even view the approval transaction in the system.

Note:

The access is forbidden for performing any transaction for the person and account only from the user interface and web services and not through the background process.

At present, the system does not restrict you from uploading non-financial and financial data (such as billable charges, adjustments, payments, refund requests, write off requests, and so on) of a person for whom the **Garbling Completed (C1-GBCM)** characteristic is set to **Y**. Therefore, you need to ensure that the non-financial and financial data of such person is not uploaded in the system.

You can also garble the data of a person using the **C1-GRBPI** inbound web service. However, you can garble the data of only one person at a time using this inbound web service.

New Features (Specific to Financial Services)

This section describes the following new features added in this release which can be used in the insurance domain:

- Subscription Billing
- Two-Dimensional Pricing
- Product Lifecycle Management (PLM)

Subscription Billing

Oracle Revenue Management and Billing (ORMB) facilitates the service based billing wherein the customers pay a subscription price to have access to a product or service. For example, the customer may subscribe for newspaper service, cable service, internet service, video service (like Netflix, Amazon Prime Video), cloud service, and so on. The consumers may have to pay one or more charges with respect to the subscribed service. These charges can be one-time or recurring charges in nature.

In ORMB, you can carry out service based billing for an account by creating subscription on the account. While creating an account subscription, you need to specify the subscription type using which you want to create the account subscription. It is the subscription type which helps the system to determine:

- The business object using which the account subscription must be created in the system.
- The division and the type of contract on which the account subscription must be created.
- The default duration for which the account subscription or service charge must be renewed when the automatic renewal option is selected.
- Whether the service charges should be prorated when the account subscription is suspended for a particular duration, or when one or more services or the entire account subscription is terminated.
- Whether already billed charges should be adjusted on the next bill in case of suspension and termination.
- The adjustment type using which the adjustments must be created when the account subscription is edited, suspended, or resumed.
- The adjustment type using which the adjustments must be created when one or more services or the entire account subscription is terminated.
- The services which the consumer can subscribe when the account subscription is created using the subscription type.
- The charges which can be charged when the consumer subscribes for a particular service.
- The distribution code for each charge which indicates the GL account to which the corresponding financial transaction must be posted.
- Whether the monthly recurring revenue is exempted for the service.
- The algorithm which must be executed when the account subscription is terminated, suspended, or resumed.

While creating an account subscription, the system allows you to use only those subscription types for the account which are defined for the division to which the account belongs and which are associated with the contract type whose contract exists on the account. You can specify whether the account subscription must be automatically renewed for the default duration (which is specified in the subscription type). In case of subscription renewal, you can specify whether there is any cost escalation at the time of renewal. You can add services and its charges in the account subscription depending on the subscription type. The system allows you to indicate whether the charge is a one-time charge or a recurring charge. You can specify the frequency at which the recurring charges should be created for the subscribed services. In case of service charge renewal, you can specify whether there is any cost escalation at the time of renewal.

Once an account subscription is created, the status of the account subscription is set to **Draft**. You can then edit, delete, submit, or cancel the account subscription, if required. You can optionally configure approval workflow for the account subscription. On submitting an account subscription when the approval workflow is off, the status of the account subscription is changed to **Active**. However, on submitting an account subscription when the approval workflow is on, an approval transaction is created for the account subscription. Only when the approver approves the approval transaction, the status of the account subscription is changed to **Active**. Note that the status of the account subscription is changed to **Active** only when the subscription start date is earlier than or equal to the current date. If the subscription start date is a future date, the status of the account subscription is changed to **Validated** irrespective of whether the approval workflow is on or off.

You can edit the details of an account subscription, if required. However, if the account subscription is in the **Active** status, you can only add the services and charges in the account subscription and change the end date of the existing services and charges. But, you cannot remove a service or charge from the account subscription.

The system allows you to suspend the account subscription for a particular duration. While suspending the account subscription, you need to specify the suspension reason and suspension condition indicating whether fees should be charged or not for the suspended period. If the **No Fee** option is selected from the **Suspension Condition** list and the **Prorate Charges** and **Adjust Billed Charges** options are selected in the respective subscription type, the adjustments are created against the charges which are already billed to the customer at the time of resuming the account subscription. These adjustments are then posted onto the next bill. If the suspension end date is not specified, the adjustments are created against the charges which are already billed to the customer on the subscription end date. If the account subscription or its service is terminated during the suspension period, the adjustments are created against the charges which are already billed to the customer on the termination date.

The system automatically resumes the account subscription on the suspension end date through a batch process. You can also manually resume the account subscription before the suspension end date.

The system also allows you to terminate a particular service or all services at the same time. While terminating a service, you can specify the termination charges, if any. If the termination charges are specified, the adjustments will be created and posted accordingly on the next bill. In addition, if the **Prorate Charges** and **Adjust Billed Charges** options are selected in the respective subscription type, the adjustments are created against the charges which are already billed to the customer and posted onto the next bill. You can also terminate a particular service or all services in an account subscription when it is in the **Suspended** status.

A batch named **Account Subscription Periodic Monitor (C1-ASUBM)** is introduced in this release. It monitors or checks whether there are any account subscriptions in the **Validated**, **Active**, or **Suspended** status. The following table lists how the **C1-ASUBM** batch behaves in various scenarios:

If...	Then...
There is an account subscription in the Validated status and its subscription start date is earlier than or equal to batch business date	The status of the account subscription is changed to Active .
There is an account subscription in the Active status and its subscription end date is earlier than or equal to batch business date	The status of the account subscription is changed to Expired .
There is an account subscription in the Active status and its suspension start date is equal to batch business date	The status of the account subscription is changed to Suspended .
There is an account subscription in the Active status and its service termination date is earlier than or equal to batch business date	The service end date is set to termination date. However, the status of the account subscription remains as Active .
There is an account subscription in the Active status and all services termination date is earlier than or equal to batch business date	The services' end date and subscription end date is set to termination date. In addition, the status of the account subscription is changed to Terminated .
If there is an account subscription in the Suspended status and its suspension end date is equal to batch business date	The status of the account subscription is changed to Active .

The following two screens are introduced in this release to implement the subscription billing feature:

- Subscription Type
- Account Subscription

Note: The subscription renewal and MRR exemption features will be available in the future release. Only the metadata for capturing the subscription renewal and MRR related information is provided in the current release.

Two-Dimensional Pricing

Oracle Revenue Management and Billing enables you to define two-dimensional pricing for a price item. In the two-dimensional pricing, you can offer rates based on utilization of two service quantity identifiers (SQIs). For example, the rate for a price item can vary for each customer depending on the number of ATM transactions and current monthly balance as shown below:

Current Monthly Balance	Number of ATM Transactions			
	0-25	25-50	50-75	75-100
0-10000	2	1.9	1.8	1.7
10000-50000	1.6	1.5	1.4	1.3
50000-100000	1.2	1.1	1.0	0.9
100000-500000	0.8	0.7	0.6	0.5

The system allows you to define two-dimensional pricing in a grid which has X-axis and Y-axis. Both, the X-axis and Y-axis should contain service quantity identifiers (SQIs). The two-dimensional pricing is composed of threshold and step tiered pricing. The X-axis is a threshold tier and Y-axis is a step tier. On creating two-dimensional pricing, one price component is created for each X-axis and Y-axis combination. The step tier is stored as the tiering range whereas the threshold tier is stored as the eligibility criteria in the price component. Note that the tiering ranges and eligibility criteria are automatically created in the price component. You cannot manually add a tiering range and eligibility criteria in the price component.

You can define two-dimensional pricing only when the tiering type of the rate components in the rate schedule is set to **STEP**. A new field named **Pricing Rule Type** is added in the **Price Item Pricing** screen. If you select the **Two-Dimensional** option from the **Pricing Rule Type** list, you can define two-dimensional pricing for the price item. However, if you do not select the **Two-Dimensional** option from the **Pricing Rule Type** list, you can define traditional flat, step, or tiered pricing for the price item.

Besides selecting the **Two-Dimensional** option from the **Pricing Rule Type** list, you also need to select the **Pricing Eligibility** option while defining the two-dimensional pricing for the price item.

Product Lifecycle Management (PLM)

Oracle Revenue Management and Billing facilitates a process of managing the entire lifecycle of a product from inception to service and then to retirement. The system allows you to create the following types of products:

- **Standard** – This type of a product is a standalone product.
- **Packaged** – This type of a product is a bundle or group of products.
- **Informational** – This type of a product is used in the product hierarchy, but does not have its own pricing.

On creating a product, the status of the product is set to **Draft**. You can associate a product to one or more divisions. You can create a product to product relationship in the system. You can add product versions in the product. A product version is the entity which holds the following information:

- Product services which are offered with the product
- Price list from where the pricing for offered product services should be obtained
- Eligibility criteria which must be satisfied when the account enrolls for the product

The above information is captured when you create a product version for a standard product. However, when you create a product version for a packaged product, it holds the following information:

- Standard products which are offered in the packaged product

Note: Some of these products might be mandatorily offered with the packaged product while some of the products might be optional.

- Standard products' services which are offered in the packaged product

Note: Some of these product services might be mandatorily offered with the standard product while some of the product services might be optional.

- Add-on product services which are offered in the packaged product
- Price list from where the pricing for offered product services and add-on product services should be obtained
- Eligibility criteria which must be satisfied when the account enrolls for the packaged product

A product version is effective from a particular date and its effective date must fall within the product date range. On creating a product version, the status of the product version is set to **In Progress**. You can activate a product only when at least one of its product versions is in the **Finalized** status.

A product service can be associated to one or more price items. A product service can be offered with a product only when it is associated with at least one price item in the system.

Once the product is activated, you can enroll the account for the product. On enrolling for a product, the system retrieves the product details from the product version which is effective on the system date. While enrolling for a standard product, you cannot remove mandatory product services from the product. However, you can enroll for optional product services which are offered with the product.

Similarly, while enrolling for a packaged product, you cannot remove mandatory products and product services from the packaged product. However, you can enroll for optional products and product services which are offered with the packaged product. While enrolling an account for a product, you can set the product enrollment priority for the account.

Once you create the product enrollment, the status of the enrollment is set to **Pending**. On submitting the product enrollment, the validation process is initiated. If all conditions are met, the status of the product enrollment is changed to **Enrolled**. You can unenroll for the product, whenever required.

You can retire a product, whenever required. The product, product version, and product enrollment goes through various statuses in their lifecycle.

The following batches are newly introduced for the Product Lifecycle Management feature:

- Product BO Monitor (C1-PRTRN)
- Product Enrollment Monitor (C1-ENTRN)

For more information about these batches, see Oracle Revenue Management and Billing Batch Guide.

New Features (Specific to Insurance)

This section describes the following new features added in this release which can be used in the insurance domain:

- Customer Management
- Administrative Services Only (ASO) Policy
- Administrative Services Only (ASO) Billing
- Stop-Loss
- Administrative Services Only (ASO) Pricing
- Pricing Group
- Bill Group Sorting
- Bill Group Derivation and Pricing Parameters
- ASO Customer Inbound Message

Customer Management

Oracle Revenue Management and Billing enables you to create customers and accounts for Administrative Services Only (ASO) Billing. The self-funded employers can be configured as parent customers in the system. This is possible by setting the person type of the self-funded employer to **Parent Customer**.

The system also allows you to maintain one or more bill groups for a parent customer. Each bill group can be used for billing the claim and enrollment transactions of the employees with specific attributes. These bill groups are configured as persons in ORMB where the person type is set to **Bill Group**. These bill groups should be defined as the child persons of the parent customer (i.e. self-funded employer) using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLNG** feature configuration.

The claim, specific stop-loss, aggregate stop-loss, claim based fees, and enrollment based fees billable charges are billed on the bill group's account. Therefore, every bill group should have at least one account in the system. The bill group can have more than one account. Depending on the employer's preference, the billable charges for claim, specific stop-loss, aggregate stop-loss, claim based fees, and enrollment based fees can be billed on the same or different accounts. The system enables you to maintain different types of accounts (such as, standard and retention) for a bill group by defining the **Invoice Type (C1INVTYP)** characteristic for the account. Depending on the requirements, you can bill the above billable charges on different accounts of a bill group.

Note: At present, no values are shipped for the **Invoice Type (C1INVTYP)** characteristic type. You must define the predefined characteristic values as per the business requirements.

You can also set the priority for an account based on the invoice type while specifying the billing account information for a price item in a pricing rule type. For example,

Price Item	Priority	Account with Invoice Type
P1	10	Standard
P1	20	Retention

In this case, while mapping a transaction to P1, the system checks whether an account exists for the bill group where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard**. If so, it maps the transaction to P1 and the standard account of the bill group. However, if an account does not exist for the bill group where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard**, the system checks whether an account exists for the bill group where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention**. If so, it maps the transaction to P1 and the retention account of the bill group. If an account does not exist for the bill group where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention**, the status of the transaction is changed to **Error**.

Administrative Services Only (ASO) Policy

Oracle Revenue Management and Billing enables you to create the Administrative Services Only (ASO) policies in the system. A new business object named **ASO Policy (C1-ASOPolicy)** is introduced in this release. Once the ASO policy is created, it goes through the following statuses in its lifecycle:

- Pending
- In Force/Active
- Runout
- Post Runout

In the ASO policy, you can specify the runout end date. It helps the system to determine the runout and post runout period for the policy. You can also renew an ASO policy for a particular period. The status of the base policies is automatically changed to **Runout** when the status of the latest renewed policy is changed to **Runout**.

A batch named **Policy Periodic Monitor (C1-POLPR)** monitors or checks whether there are any ASO policies in the **Pending**, **In Force/Active**, or **Runout** status. The following table lists how the batch behaves in various scenarios:

If...	Then...
If the ASO policy is in the Pending status and the policy start date is earlier than or equal to the system date	A To Do is created using the To Do type which is specified in the To Do Type For Pending Status parameter of the C1-ASOPOLMOA algorithm.

If...	Then...
If the ASO policy is in the Pending status and the policy start date – X days (specified in the C1-ASOPOLMOA algorithm) is earlier than or equal to the system date	A To Do is created using the To Do type which is specified in the To Do Type For Pending Status parameter of the C1-ASOPOLMOA algorithm.
If the policy start date of the ASO policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the To Do Type For Pending Status parameter is completed	The status of the ASO policy is changed from Pending to In Force/Active .
If the ASO policy is in the Active status and the policy end date – X days (specified in the C1-ASOPOLMOA algorithm) is earlier than or equal to the system date	A To Do is created using the To Do type which is specified in the To Do Type For Active Status parameter of the C1-ASOPOLMOA algorithm.
If the policy end date of the ASO policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the To Do Type For Active Status parameter is completed	The status of the ASO policy is changed from In Force/Active to Runout .
If the ASO policy is in the Runout status and the runout end date – X days (specified in the C1-ASOPOLMOA algorithm) is earlier than or equal to the system date	A To Do is created using the To Do type which is specified in the To Do Type For Runout Status parameter of the C1-ASOPOLMOA algorithm.
If the runout end date of the ASO policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the To Do Type For Runout Status parameter is completed	The status of the ASO policy is changed from Runout to Post Runout .

Note that when you click the **Activate** and **Runout** buttons in the **Policy** screen, the system checks whether the To Do generated by the **Policy Periodic Monitor (C1-POLPR)** batch is completed before changing the policy status.

On creating the policy, a contract of the contract type (which is specified in the **ASO Contract Types** parameter of the **C1-ASOBOPOSP** algorithm) is created on the accounts of the policy persons which are associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

Administrative Services Only (ASO) Billing

Administrative Services Only (ASO) is an arrangement in which an organization funds its own employee benefit plan such as a health plan but hires an outside firm to perform specific administrative services. For example, an organization may hire an insurance company to evaluate and process claims under its employee health plan, while maintaining the responsibility to pay the claims itself.

ASO Plan specifics vary depending on the agreement a company establishes with insurance companies and third-party administrators (TPA). In the ASO plan, the insurance company may provide little to no degree of insurance protection. ASO services are gaining popularity because many employers, particularly larger ones, explore that the ASO plan provides the potential financial advantages at an acceptable cost.

Oracle Revenue Management and Billing (ORMB) provides a complete solution in terms of pricing, billing and revenue management to support the ASO plans. It also provides risk coverage for offering self-funded plans through the stop-loss services, such as specific stop-loss and aggregate stop-loss. The specific stop-loss solution in ORMB helps the employer in mitigating high-cost claims for individual members. And, the aggregate stop-loss helps the employer in mitigating risk against high-volume claims.

The Transaction Feed Management feature is enhanced to support the Administrative Services Only (ASO) billing. You can upload the claim and enrollment transactions in the system. Once the claim and enrollment transactions are uploaded in the system, you need to:

- Validate Header Details
- Validate Transaction Details and Determine Initial Price Item
- Verify Price Item Pricing
- Rate Transactions Before Billing (if required)
- Create and Update Billable Charge with the SQI values
- Clean-up Unwanted Data

The system provides the flexibility to rate the transactions either prior to billing or during billing. Based on the business requirements, you can configure the system such that transactions mapped to some price item can be rated at a frequency which is different than the account's billing frequency. For example, daily, weekly, etc. During the transaction feed management process, each transaction goes through various statuses until it is billed to the person.

A new pricing model is introduced for the Administrative Services Only (ASO) business which enables you to create pricing rules for claim, specific stop-loss, aggregate stop-loss, claim based fees, and enrollment based fees. Once you create the required pricing structure, you can bill the employers for various claim and enrollment related charges.

Once the billable charges for claims, claim based fees, and enrollment based fees are created through the transaction aggregation process, you can bill them by executing the following charge-based billing batches in the specified sequence:

1. Pending Bill Generation (C1-PNDBL)
2. Bill Segment Generation (C1-BLGEN)
3. Bill Completion (C1-BLPPR)

You can accumulate specific stop-loss and aggregate stop-loss and create billable charges for them using the stop-loss feature in ORMB. You can then bill the specific stop-loss and aggregate stop-loss billable charges in the system using the charge-based billing batches.

Stop-Loss

Oracle Revenue Management and Billing enables you to accumulate the specific stop-loss and aggregate stop-loss and create billable charges for them. Once the transaction calculation lines for specific stop-loss and aggregate stop-loss are created using the transaction aggregation process, you need to execute the following batches in the specified sequence:

1. Stamp Accumulate After Date (C1-STAAD)
2. Accumulate Specific Stop-Loss (C1-ACSSL)
3. Create Billable Charge for Specific Stop Loss (C1-BCSSL)
4. Accumulate Aggregate Stop-Loss (C1-ACASL)
5. Create Billable Charge for Aggregate Stop Loss (C1-BCASL)

For more information about these batches, see Oracle Revenue Management and Billing Batch Guide.

Administrative Services Only (ASO) Pricing

Oracle Revenue Management and Billing introduces a new pricing model for the Administrative Services Only (ASO) business. In this pricing model, you can define pricing rules using a pricing rule type. You can define the following pricing rule types in ORMB:

- Claim
- Specific Stop-Loss
- Aggregate Stop-Loss
- Retention Type Claim Based
- Retention Type Enrollment Based

Extendable Lookups

Before you define the above mentioned pricing rule types in ORMB, you need to define values for the following extendable lookups:

- Rate Option (C1-ExtLookRetTypeRateOpt)
- Line Item (C1-ExtLookPricingRuleLineItem)
- Claim Template (C1-ExtLookClaimTemplate)

Rate Option Extendable Lookup

The basic pricing details (such as rate schedule, pricing currency) and the transaction aggregation details may vary from one bill group or parent customer to another and from one price item to another. The basic pricing and transaction aggregation details are defined in the rate option. Each rate option must be defined in the system using the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup. A rate option encapsulates the following information:

- The rate schedule that you want to use while defining the price item pricing. It is the rate schedule which helps the system to create calculation lines for a transaction leg.
- Currency in which you want to define the price item pricing.
- Whether zero pricing should be displayed in the bill.
- Whether the transactions mapped to the price item should be ignored for billing.
- Whether the transactions mapped to the price item should be aggregated for billing.
- The aggregation schedule using which the transactions should be aggregated for billing.
- How and when you want to rate the transaction legs which are mapped to the price item. The valid values are:
 - Aggregate Transactions and Then Rate SQs

Note: This value appears in the list only when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**.

- Do Not Rate Transactions
- Rate Transaction and Aggregate Calc Lines

Note: This value appears in the list only when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**.

- Rate Transactions

Note: This value appears in the list only when the **Ignore Transaction** field is set to either **Yes** or **No** and the **Aggregate Transaction** field is set to **No**.

- Whether you want the price item pricing to be applied to all customers or only to the new customers.

Once the rate options are defined in the extendable lookup, you can associate one or more rate options with a price item while adding the price item in a claim, specific stop-loss, aggregate stop-loss, retention

type claim based, retention type enrollment based, or ancillary pricing rule type. You can then use the rate option while defining pricing rule for the respective price item using the respective pricing rule type. The rate option specified in a pricing rule is used while creating the price item pricing or price assignment for the pricing rule. For example,

Claim Pricing Rule Type	Price Item	Rate Option	Claim Pricing Rule	Price Item Pricing
CPRT1	P1	R1	CPR1 (Price Item: P1, Rate Option: R1)	PA1 is created for P1 using the details specified in R1.
		R2	-	-
		R3	CPR2 (Price Item: P1, Rate Option: R3)	PA2 is created for P1 using the details specified in R3.
	P2	R1	-	-
		R4	CPR3 (Price Item: P2, Rate Option: R4)	PA3 is created for P2 using the details specified in R4.
CPRT2	P1	R1	CPR4 (Price Item: P1, Rate Option: R1)	PA4 is created for P1 using the details specified in R1.

Line Item Extendable Lookup

Different charges, such as consumer-driven amount, traditional healthcare amount, network access fees, and so on are received as part of the claim transaction. These charges which contribute to the total claim amount are defined as the line items in the system. Each line item must be defined in the system using the **Line Item (C1-ExtLookPricingRuleLineItem)** extendable lookup. A line item encapsulates the following information:

- Service Quantity Identifier (SQI) which indicates the transaction field in which the charge amount is stored. It is also used while calculating the percentage based markup or markdown for the charge.
- Billable charge line type using which you want to create the calculation line for the charge.
- Whether the system should write off the charge when it is not eligible for billing.
- Billable charge line type using which you want to create the write off calculation line for the charge.
- Whether the charge should be considered while calculating the percentage based retention type claim based fee.
- A pricing rule type category which is associated with the charge. The following table describes the significance of each category that can be associated with the charge:

Pricing Rule Type Category	Significance
Claim	Whether the charge can be included in a claim template and thereby while defining a claim pricing rule for a parent customer and bill group.

Pricing Rule Type Category	Significance
Specific Stop-Loss	Whether the charge can be considered while calculating specific stop-loss.
Aggregate Stop-Loss	Whether the charge can be considered while calculating aggregate stop-loss.
Retention Type Claim Based	Whether the charge can be used while calculating the percentage based retention type claim based fee.
Ancillary	Whether the charge can be considered while defining pricing arrangements in an ancillary pricing rule type.

For example, you can create a line item for the following charges:

Charge	Line Item	Write Off, If Not Eligible for Billing	Pricing Rule Type Category
Consumer-Driven Amount	CDH	Yes	Claim
			Specific Stop-Loss
			Aggregate Stop-Loss
			Ancillary
Traditional Healthcare Amount	THC	Yes	Claim
			Specific Stop-Loss
			Aggregate Stop-Loss
Preventive Care Charges	PCC	No	Ancillary

The CDH and THC line items can be included in a claim template. They can also be considered while calculating specific and aggregate stop-loss. The CDH and PCC line items can be considered while defining pricing arrangements in an ancillary pricing rule type.

In addition, any charge received for the CDH and THC line items in a claim transaction will be written off when these line items are not eligible for billing.

Note: At present, the line items are not used in the pricing rule types where the pricing rule type category is set to **Retention Type Enrollment Based** and **Flat Fees**.

Claim Template Extendable Lookup

The ASO service provider may bill different charges for a claim transaction to different employers. The system enables you to create different claim templates for different employers. A claim template contains a set of charges (i.e. line items) which can be billed to a parent customer or bill group. You can define multiple claim templates in the system. Each claim template must be defined in the system using

the **Claim Template (C1-ExtLookClaimTemplate)** extendable lookup. A claim template encapsulates the following information:

- Whether the claim template can be used while defining a claim pricing rule for a policy which is in the **In Force/Active**, **Post Runout**, or **Runout** status.
- Line items which can be billed to a parent customer or bill group.
- Whether you want to calculate the markup or markdown on the line items which are included in the claim template.
- Whether you want to specify a flat markup or markdown amount for the line items or the markup or markdown percentage for the line items which are eligible for percentage based markup or markdown
- Whether a line item is eligible for billing or not.
- Whether you want to define rule based billing eligibility for a line item.
- Whether you want to define billing eligibility for a line item while defining a claim pricing rule.
- Rule type which indicates the rules that should be executed to determine whether the line item is eligible for billing.
- Whether the line item is eligible for percentage based markup or markdown when the markup or markdown type is set to **Percentage**.

Once a claim template is defined in the extendable lookup, you can associate the claim template with a claim pricing rule type. You can associate multiple claim templates with a claim pricing rule type. Then, while defining a claim pricing rule for a parent customer, you can use any one of the claim template associated with the respective claim pricing rule type. The system then inherits the line items and the default markup and markdown values in the claim pricing rule from the claim template.

However, while defining a claim pricing rule for a policy of a bill group, you can only use the claim templates which are defined for the respective policy status and associated with the respective claim pricing rule type.

For example, you can create the claim templates with the following line items:

Claim Template	Policy Status	Line Item	Billing Eligibility	Pricing Strategy	Markup or Markdown Type	Markup or Markdown Amount	Markdown or Markdown Percentage
CT1	In Force/Active	CDH	Yes	Markup	Flat Amount	\$2	-
		THC	Yes				
		PCC	No				
CT2	Runout	CDH	Yes	Markdown	Percentage	-	2.00
		THC	Yes				
CT3	Post Runout	PCC	Yes	None	-	-	-
		NAF	No				

Claim Pricing

The ASO service provider processes the claims as part of the ASO agreement and pays the claim amount to either hospital or main subscriber. The employer, in turn, reimburses the claim amount to the ASO service provider at the end of the bill period (i.e. typically, every month). Apart from charging the claim amount to the employer, the ASO service provider charges various additional fees, such as consumer-driven amount, traditional healthcare amount, network access fees, collection services fees, hospital audit fees, and so on.

Oracle Revenue Management and Billing allows the ASO service provider to bill the employers for the claim amount and various additional fees. You can use any custom mechanism or the file upload interface utility in ORMB to upload the claim transactions. The pricing for the claim transactions can be defined using the claim pricing rules. You can define a claim pricing rule at the parent customer and bill group levels. If the claim pricing rule is available at both the levels, the claim pricing rule at the bill group level takes precedence over the claim pricing rule at the parent customer level. You can define claim pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define a claim pricing rule using a claim pricing rule type. It is the claim pricing rule type which helps the system to determine:

- Business object using which the claim pricing rule should be created in the system.
- Whether it is the primary pricing rule type from where the related pricing rule types will inherit the transaction field mapping details.

Note:

You must select the **Primary** option while defining a claim pricing rule type. On selecting the **Primary** option, the **Related Pricing Rule Types** and **Transaction Field Mapping** sections appear in the **Claim Pricing Rule Type** screen.

You can add a pricing rule type, which belongs to any of the following category, as the related pricing rule type in the claim pricing rule type:

>> Retention Type Claim Based

>> Specific Stop-Loss

>> Aggregate Stop-Loss

We recommend you to add the required related pricing rule types in the above mentioned sequence.

- Pricing rule types which are related to the claim pricing rule type.
- Rule type which indicates the rules that should be executed to determine whether the related pricing rule type is eligible for deriving the transaction legs.
- Fields in which the data from the transaction fields should be stored (for example, the data from the **UDF_CHAR_1** transaction field must be stored in the **Parameter 1** field which will be used for deriving the bill group and pricing).
- Algorithm which should be triggered for validating a claim transaction.

Note: An algorithm type for validating a claim transaction is not shipped with the product. You can create a custom algorithm type, if required.

- Algorithm which should be triggered for deriving the bill group, parent customer, and policy for a claim transaction.

Note: You must create an algorithm using the **C1_TXNBGDRV** algorithm type and attach it to the **Bill Group Derivation** system event.

- Algorithm which should be triggered for deriving the account and price item for a claim transaction.

Note: You must create an algorithm using the **C1_ACCPRIDRV** algorithm type and attach it to the **Account and Price Item Derivation** system event.

- Algorithm which should be triggered for determining the bill after date.

Note: You must create an algorithm using the **C1_BAFTDRV** algorithm type and attach it to the **Bill After Date Determination** system event.

- Pricing rule post-processing algorithm which should be triggered once the effective claim pricing rule is derived.

Note: A pricing rule post-processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.

- Additional generic information, such as:
 - Whether the price items included in the claim pricing rule type are eligible for specific stop-loss.
 - Value when received in a claim transaction indicates that the claim transaction is a run-in claim transaction. In ORMB, a transaction leg is not derived for the run-in claim transaction. However, it is only considered while calculating specific stop-loss and aggregate stop-loss.
 - Whether the claim charges should be written off when the bill is generated in the post runout period of the policy. If so, a write-off adjustment is created against the respective bill segment during the post bill completion. The write-off adjustment is created using the post runout write-off adjustment type which is specified in the claim pricing rule type.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the price item should be considered for billing.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the related pricing rule type should be considered for deriving the transaction legs.
 - Value which the output parameter in the rule should return when the price item and related pricing rule type in the claim pricing rule type should be considered for processing.

- Price items for which you can define claim pricing rules using the claim pricing rule type.
- Rate options that you can use while defining the pricing for the respective price item.
- Type of account to which the respective price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.
- Price item parameters that you can use for aggregating the claim transaction legs or while defining the accumulation criteria for specific stop-loss and aggregate stop-loss. Note that the system does not support multiple parameter based claim pricing. Therefore, you should not specify a price item parameter where the parameter usage is set to **Pricing**.
- Claim templates which you can use while defining the claim pricing rules using the claim pricing rule type.
- Additional claim-specific information, such as:
 - Transaction field which you want to use in the rules as the output parameter to determine whether a line item in the claim template is eligible for billing.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown charge line is eligible for billing.
 - Billable charge line type using which you want to create the charge line for markup and markdown.
 - Rule type which indicates the rules that should be executed to determine whether the markup or markdown charge line is eligible for billing.

Once a claim pricing rule type is defined, you can define claim pricing rules using the claim pricing rule type. While defining a claim pricing rule for a parent customer and bill group, you need to specify the following:

- A claim pricing rule type using which you want to create the claim pricing rule.
- Price item for which you want to define the pricing rule.
- Date range during which the pricing rule is effective.
- Rate option which you want to use while defining the claim pricing.
- Claim template which contains charges (i.e. line items) which you want to bill to the bill group.
- Whether you want to markup or markdown the various charges.
- Whether you want to use a flat amount for markup or markdown for line items.
- The percentage of markup or markdown for each line item which is eligible for percentage based markup or markdown.
- Whether a line item is eligible for billing when the billing eligibility for the line item in the claim template is set to **User Defined**.

Note: You can override the default markup and markdown values which are retrieved from the claim template.

In addition, while defining a claim pricing rule for a bill group, you need to specify the status of the policy for which you want to define the claim pricing rule. You can also specify a pricing group while

defining a claim pricing rule for a bill group. If you specify a pricing group while defining a claim pricing rule for a bill group, you will have to define the following details for each rule of the pricing group:

- Whether you want to markup or markdown the various charges.
- Whether you want to use a flat amount for markup or markdown for line items.
- The percentage of markup or markdown for each line item which is eligible for percentage based markup or markdown.
- Whether a line item is eligible for billing when the billing eligibility for the line item in the claim template is set to **User Defined**.

Once a claim pricing rule is defined for a parent customer or bill group, the system creates a price list and pricing for the price item using the rate option specified in the claim pricing rule. The system defines the price item pricing on the price list and then assigns the price list to parent customer.

Retention Type Claim Based Pricing

The ASO service provider provides claim administrative services and pays the claim amount on behalf of the employer. Different charges, such as administration fees, network fees, managed care fees, are typically charged as retention type claim based fees. The system enables you to charge a flat or percentage based retention type claim based fee. The rate schedule defined in the respective rate option indicates whether the retention type claim based fee is a flat fee or percentage based fee. The system considers the claim line items for calculating the percentage based retention type claim based fee only when the **Retention Claim Based Percentage Calculation** field is set to **Yes**.

You can define a retention type claim based pricing rule at the parent customer and bill group levels. The retention type claim based pricing rule at the bill group level takes precedence over the retention type claim based pricing rule at the parent customer level. You can define retention type claim based pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define a retention type claim based pricing rule using a retention type claim based pricing rule type. It is the retention type claim based pricing rule type which helps the system to determine:

- Business object using which the retention type claim based pricing rule should be created in the system.
- Algorithm which should be triggered while validating a transaction.

Note: An algorithm type for validating a transaction is not shipped from the product. You need to create a custom algorithm type, if required.

- Algorithms which should be triggered while deriving account and price item for a transaction.

Note: You must create an algorithm using the **C1_ACCPRIDRV** algorithm type and attach it to the **Account and Price Item Derivation** system event. The **C1_BAFTDRV** algorithm sets the bill after date to the end date of the aggregation schedule which is specified in the respective rate option. For example, if the aggregation schedule is monthly, the bill after date is set to the last day of the month.

- Algorithm which should be triggered while determining the bill after date.

Note: You must create an algorithm using the **C1_BAFTDRV** algorithm type and attach it to the **Bill After Date Determination** system event.

- Post-processing algorithm which should be triggered once the claim pricing rule is derived.

Note: A post-processing algorithm type is not shipped from the product. You need to create a custom algorithm type, if required.

- Price items for which you can define retention type claim based pricing rules using the retention type claim based pricing rule type.
- Rate options that you can use while defining the pricing for a price item.
- Different type of account to which the price item should be billed based on the specified priority.
- Price item parameters which you can use while defining retention type claim based pricing rules.
- Additional information, such as:
 - Whether the price items included in the retention type claim based pricing rule type are used while accumulating specific stop-loss and aggregate stop-loss.
 - Identifiers which help to determine whether the claim transaction is received during the run-in period of the policy.
 - Indicates how the claim must be disposed. If the **Claim Disposition** field in the transaction is set to **Yes**, you must set the disposition mode to **Align Signage**. However, if the **Claim Disposition** field in the transaction is set to **No**, you must set the disposition mode to **Zero Out**.

Note: If the **Disposition Mode** field is set to **Align Signage**, the claim based fees is positive for positive claims and the claim based fees is negative for negative claims. However, if the **Disposition Mode** field is set to **Zero Out**, the claim based fees for the negative claims is set to zero (0).

Once a retention type claim based pricing rule type is defined, you can create retention type claim based pricing rules using the retention type claim based pricing rule type. While defining a retention type claim based pricing rule for a parent customer and bill group, you need to specify the following:

- Price item for which you want to define the pricing.
- Pricing date range during which the pricing is effective.
- Rate option which you want to use while defining the retention type claim based pricing.
- Price item parameters based on which you want to define the pricing

Note: You can only use those price item parameters which are included in the respective retention type claim based pricing rule type.

- Flat or percentage based fee which you want to charge for a price item and price item parameters combination.

In addition, while defining a retention type claim based pricing rule for a bill group, you need to specify the status of the policy for which you want to define the retention type claim based pricing rule. You can also specify a pricing group while defining a retention type claim based pricing rule for a bill group. If you specify a pricing group while defining a retention type claim based pricing rule for a bill group, you will have to define the following details for each rule defined in the pricing group:

- Price item parameters based on which you want to define the pricing

Note: You can only use those price item parameters which are included in the respective retention type claim based pricing rule type.

- Flat or percentage based fee which you want to charge for a price item and price item parameters combination.

The system enables you to define different flat or percentage based fee for different set of price item parameters combination. For example, you can define one flat fee for the claim transactions where health coverage is set to Dental and submission type is set to Paper and another flat fee for the claim transactions where health coverage is set to Dental and submission type is set to Paper.

Once a retention type claim based pricing rule is defined for a parent customer and bill group, the system creates one price assignment for each set of price item parameters combination, one price list, and one price list assignment.

Retention Type Enrollment Based Pricing

Some of the charges, such as stop-loss premium, administrative fees, etc. are typically calculated based on the number of enrollments. In addition, the ASL limit can also be based on the number of enrollments for the month. These charges can be calculated using the retention type enrollment based pricing rules.

You can define a retention type enrollment based pricing rule at the parent customer and bill group levels. The retention type enrollment based pricing rule at the bill group level takes precedence over the retention type enrollment based pricing rule at the parent customer level. You can define retention type enrollment based pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define a retention type enrollment based pricing rule using a retention type enrollment based pricing rule type. It is the retention type enrollment based pricing rule type which helps the system to determine:

- Business object using which the retention type enrollment based pricing rule should be created in the system.

- Whether it is the primary pricing rule type.

Note: You must select the **Primary** option while defining a retention type enrollment based pricing rule type. On selecting the **Primary** option, the **Related Pricing Rule Types** and **Transaction Field Mapping** sections appear in the **Retention Type Enrollment Based Pricing Rule Type** screen. At present, the system does not allow you to define any pricing rule type which inherits the attributes from the retention type enrollment based pricing rule type.

- Transaction fields from where the data for retention type enrollment based processing should be retrieved.
- Algorithm which should be triggered while validating a transaction.

Note: An algorithm type for validating a transaction is not shipped from the product. You need to create a custom algorithm type, if required.

- Algorithms which should be triggered while deriving bill group, account, and price item for a transaction.

Note: You must create an algorithm using the **C1_TXNBGDRV** algorithm type and attach it to the **Bill Group Derivation** system event. Similarly, you must create an algorithm using the **C1_ACCPRIDRV** algorithm type and attach it to the **Account and Price Item Derivation** system event.

- Algorithm which should be triggered while determining the bill after date.

Note: You must create an algorithm using the **C1_BAFTDRV** algorithm type and attach it to the **Bill After Date Determination** system event. The **C1_BAFTDRV** algorithm sets the bill after date to the end date of the aggregation schedule which is specified in the respective rate option. For example, if the aggregation schedule is monthly, the bill after date is set to the last day of the month.

- Post-processing algorithm which should be triggered once the retention type enrollment based pricing rule is derived.

Note: A post-processing algorithm type is not shipped from the product. You need to create a custom algorithm type, if required.

- Price items for which you can define retention type enrollment based pricing rules using the retention type enrollment based pricing rule type.
- Rate options that you can use while defining the pricing for a price item.
- Different type of account to which the price item should be billed based on the specified priority.
- Price item parameters which you can use while defining retention type enrollment based pricing rules.
- Additional information, such as:
 - Whether the price items included in the retention type enrollment based pricing rule type are used while accumulating specific stop-loss and aggregate stop-loss.
 - Retroactivity indicator which helps to determine whether the enrollment transaction is retro or non-retro transaction.

Once a retention type enrollment based pricing rule type is defined, you can create retention type enrollment based pricing rules using the retention type enrollment based pricing rule type. While defining a retention type enrollment based pricing rule for a parent customer and bill group, you need to specify the following:

- Price item for which you want to define the pricing.
- Pricing date range during which the pricing is effective.
- Rate option which you want to use while defining the retention type enrollment based pricing.
- Whether you want to exempt the retrospective transactions while calculating retention type enrollment based fees.
- Price item parameters based on which you want to define the pricing

Note: You can only use those price item parameters which are included in the respective retention type enrollment based pricing rule type.

- Flat fee which you want to charge for a price item and price item parameters combination.

In addition, while defining a retention type enrollment based pricing rule for a bill group, you need to specify the status of the policy for which you want to define the retention type enrollment based pricing rule. You can also specify a pricing group while defining a retention type enrollment based pricing rule for a bill group. If you specify a pricing group while defining a retention type enrollment based pricing rule for a bill group, you will have to define the following details for each rule defined in the pricing group:

- Price item parameters based on which you want to define the pricing

Note: You can only use those price item parameters which are included in the respective retention type enrollment based pricing rule type.

- Flat fee which you want to charge for a price item and price item parameters combination.

The system enables you to define different flat fee for different set of price item parameters combination. For example, you can define one flat fee for the enrollment transactions where health coverage class is set to Medical and health coverage tier is set to Family and another flat fee for the enrollment transactions where health coverage class is set to Dental and health coverage tier is set to Employee.

Once a retention type enrollment based pricing rule is defined for a parent customer and bill group, the system creates one price assignment for each set of price item parameters combination, one price list, and one price list assignment.

Specific Stop-Loss Pricing

Stop-Loss coverage provides liability limits on claims for individuals and for the employer group as a whole. Specific Stop-Loss (SSL) is the form of excess risk coverage that provides protection for the employer against a high claim on any one individual. This is protection against abnormal severity of a single member claim rather than abnormal frequency of claims in total. Specific stop-loss is also known as individual stop-loss. The specific stop-loss is calculated on the claim transactions received for an individual.

You can define a specific stop-loss pricing rule at the parent customer and bill group levels. The specific stop-loss pricing rule at the bill group level takes precedence over the specific stop-loss pricing rule at the parent customer level. You can define specific stop-loss pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define a specific stop-loss pricing rule using a specific stop-loss pricing rule type. It is the specific stop-loss pricing rule type which helps the system to determine:

- Business object using which the specific stop-loss pricing rule should be created in the system.

Note: The specific stop-loss pricing rule type is not a primary pricing rule type. It inherits the attributes from a claim pricing rule type where it is included as a related pricing rule type.

- Algorithm which should be triggered while validating a transaction.

Note: An algorithm type for validating a transaction is not shipped from the product. You need to create a custom algorithm type, if required.

- Algorithms which should be triggered while deriving account and price item for a transaction.

Note: You must create an algorithm using the **C1_ACCPRISL** algorithm type and attach it to the **Account and Price Item Derivation** system event.

- Post-processing algorithm which should be triggered once the specific stop-loss pricing rule is derived.

Note: A post-processing algorithm type is not shipped from the product. You need to create a custom algorithm type, if required.

- Price items for which you can define specific stop-loss pricing rules using the specific stop-loss pricing rule type.
- Rate options that you can use while defining the pricing for a price item.
- Different type of account to which the price item should be billed based on the specified priority.

Note: Ideally, the price item parameters should not be specified in a specific stop-loss pricing rule type. The price item parameters which are specified in the claim pricing rule type are used for accumulating specific stop-loss.

- Additional information, such as:
 - Identifier which helps to determine whether the specific stop-loss should be calculated for claim transactions which are received during the run-in period of the policy.
 - SSL billable charge line type using which you want to create specific stop-loss billable charges.
 - Domestic provider claim billable charge line type using which you want to create domestic provider claim calculation lines.
 - Markup or markdown billable charge line type using which you want to create markup or markdown calculation lines.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the line item is eligible for billing.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown calculation line is eligible for billing.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the domestic provider claim calculation line is eligible for billing.

Once a specific stop-loss pricing rule type is defined, you can create specific stop-loss pricing rules using the specific stop-loss pricing rule type. While defining a specific stop-loss pricing rule for a parent customer, you need to specify the following:

- Price item for which you want to define the pricing.
- Pricing date range during which the pricing is effective.
- Rate option which you want to use while defining the specific stop-loss pricing.
- Whether the specific stop-loss pricing rule must be used for only pricing or for pricing and billing.
- Whether the specific stop-loss must be accumulated at the member or main subscriber level.
- Settlement frequency which helps to determine the bill after date. The valid values are:
 - Immediately – If you select this option from the list, the bill after date is not calculated. The specific stop-loss billable charge is billed immediately in the next bill cycle.
 - Manually (At Required Intervals) - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCSSL** batch is stamped on the specific stop-loss billable charge.
 - Never - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCSSL** batch is stamped on the specific stop-loss billable charge.
 - Yearly – If you select this option from the list, the bill after date in the specific stop-loss billable charge is set to the pricing end date.
- Accumulation parameters (such as incurred start date, incurred end date, paid start date, paid end date, etc.) based on which you want to accumulate the specific stop-loss for the claim transactions which are processed in the run-in or active period of the policy .
- The maximum limit defined for specific stop-loss at the member or main subscriber level.

- Settlement days which helps to calculate the settlement date (i.e. pricing end date, incurred end date, or paid end date whichever is later + settlement days)
- Whether the Aggregate Specific Stop-Loss (ASSL) should be calculated during the C1-BCSSL batch run for each bill group
- The ASSL limit indicating that the aggregate specific stop-loss amount beyond this limit will be paid by the insurance company to the ASSL credit account.
- Whether any member, main subscriber, or provider is excluded during the specific stop-loss calculation
- Different SSL limit (i.e. lasered amount) for a member, main subscriber, or provider who are expected to have higher claim amount

However, while defining a specific stop-loss pricing rule for a bill group, you need to specify the following:

- The status of the policy for which you want to define the specific stop-loss pricing rule.
- Price item for which you want to define the pricing.
- Parent customer's SSL pricing rule from which you want to inherit the accumulation parameters and exclusion and lasering information.

Note: The pricing date range is derived from the parent customer's specific stop-loss pricing rule because the specific stop-loss pricing rules for parent customer and bill group should have the same date range.

- Rate option which you want to use while defining the specific stop-loss pricing.
- Whether the specific stop-loss calculated for the claim transactions which are mapped to the specified price items and price item parameters should be accumulated.
- The SSL limit indicating that the specific stop-loss amount beyond this limit will be paid by the insurance company.
- The maximum specific stop-loss limit defined for the member when the claim transactions are received in the run-in period of the policy.
- Whether line items in a claim pricing rule are eligible for specific stop-loss

Note: By default, the line items where the pricing rule type category is set to Specific Stop-Loss appear in the Line Items section. If you want to set specific stop-loss eligibility for the line items which belong to a particular claim pricing rule, you must select the respective claim pricing rule.

- Whether certain percentage of SSL should be excluded while calculating specific stop-loss for domestic provider claim

You can also specify a pricing group while defining a specific stop-loss pricing rule for a bill group. If you specify a pricing group while defining a stop-loss pricing rule for a bill group, you will have to define the following details for each rule defined in the pricing group:

- Whether the specific stop-loss calculated for the claim transactions which are mapped to the specified price items and price item parameters should be accumulated.
- The SSL limit indicating that the specific stop-loss amount beyond this limit will be paid by the insurance company.

- The maximum specific stop-loss limit defined for the member when the claim transactions are received in the run-in period of the policy.
- Whether line items in a claim pricing rule are eligible for specific stop-loss

Note: By default, the line items where the pricing rule type category is set to Specific Stop-Loss appear in the Line Items section. If you want to set specific stop-loss eligibility for the line items which belong to a particular claim pricing rule, you must select the respective claim pricing rule.

- Whether certain percentage of SSL should be excluded while calculating specific stop-loss for domestic provider claim

Once a specific stop-loss pricing rule is defined for a parent customer and bill group, the system creates one price assignment, one price list, and one price list assignment.

Aggregate Stop-Loss Pricing

ASL provides a ceiling on the eligible expenses that an employer would pay, in total for all members or subscribers, during a contract period. The amount that exceeds this limit will be paid by the insurance company.

You can define an aggregate stop-loss pricing rule at the parent customer and bill group levels. The aggregate stop-loss pricing rule at the bill group level takes precedence over the aggregate stop-loss pricing rule at the parent customer level. You can define aggregate stop-loss pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define an aggregate stop-loss pricing rule using an aggregate stop-loss pricing rule type. It is the aggregate stop-loss pricing rule type which helps the system to determine:

- Business object using which the aggregate stop-loss pricing rule should be created in the system.

Note: The aggregate stop-loss pricing rule type is not a primary pricing rule type. It inherits the attributes from a claim pricing rule type where it is included as a related pricing rule type.

- Algorithm which should be triggered while validating a transaction.

Note: An algorithm type for validating a transaction is not shipped from the product. You need to create a custom algorithm type, if required.

- Algorithms which should be triggered while deriving account and price item for a transaction.

Note: You must create an algorithm using the **C1_ACCPRISL** algorithm type and attach it to the **Account and Price Item Derivation** system event.

- Post-processing algorithm which should be triggered once the aggregate stop-loss pricing rule is derived.

Note: A post-processing algorithm type is not shipped from the product. You need to create a custom algorithm type, if required.

- Price items for which you can define aggregate stop-loss pricing rules using the aggregate stop-loss pricing rule type.
- Rate options that you can use while defining the pricing for a price item.

- Different type of account to which the price item should be billed based on the specified priority.

Note: Ideally, the price item parameters should not be specified in an aggregate stop-loss pricing rule type. The price item parameters which are specified in the claim pricing rule type are used for accumulating aggregate stop-loss.

- Additional information, such as:
 - Identifier which helps to determine whether the aggregate stop-loss should be calculated for claim transactions which are received during the run-in period of the policy.
 - ASL billable charge line type using which you want to create aggregate stop-loss billable charges.
 - Domestic provider claim billable charge line type using which you want to create domestic provider claim calculation lines.
 - Markup or markdown billable charge line type using which you want to create markup or markdown calculation lines.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the line item is eligible for billing.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown calculation line is eligible for billing.
 - Transaction field which you want to use in the rules as the output parameter to determine whether the domestic provider claim calculation line is eligible for billing.
 - ASL limit price item whose effective retention type enrollment based pricing should be used to calculate the enrollment based limit when the ASL Limit (During Policy Period) or ASL Limit (During Settlement Period) field is set to Enrollment Based Limit, Enrollment Based or Minimum ASL Limit (Whichever is Greater), or Percentage of Enrollment Based Limit in the aggregate stop-loss pricing rule which is defined for a parent customer.

Once an aggregate stop-loss pricing rule type is defined, you can create aggregate stop-loss pricing rules using the aggregate stop-loss pricing rule type. While defining an aggregate stop-loss pricing rule for a parent customer, you need to specify the following:

- Price item for which you want to define the pricing.
- Parent customer's SSL pricing rule from which you want to inherit the settlement frequency, settlement days, accumulation parameters (such as incurred start date, incurred end date, paid start date, and paid end date).

Note: The pricing date range is derived from the parent customer's specific stop-loss pricing rule because the specific stop-loss and aggregate stop-loss pricing rules for a parent customer should have the same date range.

- Rate option which you want to use while defining the aggregate stop-loss pricing.
- Settlement frequency which helps to determine the bill after date. The valid values are:

- Immediately – If you select this option from the list, the bill after date is not calculated. The aggregate stop-loss billable charge is billed immediately in the next bill cycle.
- Manually (At Required Intervals) - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Date** parameter while executing the **C1-BCASL** batch is stamped on the aggregate stop-loss billable charge.
- Monthly - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Date** parameter while executing the **C1-BCASL** batch is stamped on the aggregate stop-loss billable charge.
- Yearly – If you select this option from the list, the bill after date in the aggregate stop-loss billable charge is set to the pricing end date.
- Account in which the aggregate stop-loss amount should be credited.
- Accumulation parameters (such as incurred start date, incurred end date, paid start date, paid end date, etc.) based on which you want to accumulate the aggregate stop-loss for the claim transactions which are processed in the run-in or active period of the policy.
- The maximum limit defined for aggregate stop-loss at the parent customer level.
- Settlement days which helps to calculate the settlement date (i.e. pricing end date, incurred end date, or paid end date whichever is later + settlement days)
- Whether the ASL limit should be set to either of the following during the policy period:
 - Policy Based Limit
 - Enrollment Based or Minimum ASL Limit (Whichever is Greater)
 - Enrollment Based Limit
 - Percentage of Enrollment Based Limit
- Whether the ASL limit should be set to either of the following during the settlement period:
 - Policy Based Limit
 - Enrollment Based or Minimum ASL Limit (Whichever is Greater)
 - Enrollment Based Limit

However, while defining an aggregate stop-loss pricing rule for a bill group, you need to specify the following:

- The status of the policy for which you want to define the aggregate stop-loss pricing rule.
- Price item for which you want to define the pricing.
- Parent customer's ASL pricing rule from which you want to inherit the pricing date range.

Note: The pricing date range is derived from the parent customer's aggregate stop-loss pricing rule because the aggregate stop-loss pricing rules for parent customer and bill group should have the same date range.

- Rate option which you want to use while defining the aggregate stop-loss pricing.
- Whether the aggregate stop-loss calculated for the claim transactions which are mapped to the specified price items and price item parameters should be accumulated.
- Whether line items in a claim pricing rule are eligible for aggregate stop-loss

Note: By default, the line items where the pricing rule type category is set to Aggregate Stop-Loss appear in the Line Items section. If you want to set aggregate stop-loss eligibility for the line items which belong to a particular claim pricing rule, you must select the respective claim pricing rule.

- Whether certain percentage of ASL should be excluded while calculating aggregate stop-loss for domestic provider claim

You can also specify a pricing group while defining an aggregate stop-loss pricing rule for a bill group. If you specify a pricing group while defining an aggregate stop-loss pricing rule for a bill group, you will have to define the following details for each rule defined in the pricing group:

- Whether the aggregate stop-loss calculated for the claim transactions which are mapped to the specified price items and price item parameters should be accumulated.
- Whether line items in a claim pricing rule are eligible for aggregate stop-loss

Note: By default, the line items where the pricing rule type category is set to Aggregate Stop-Loss appear in the Line Items section. If you want to set aggregate stop-loss eligibility for the line items which belong to a particular claim pricing rule, you must select the respective claim pricing rule.

- Whether certain percentage of ASL should be excluded while calculating aggregate stop-loss for domestic provider claim

Once an aggregate stop-loss pricing rule is defined for a parent customer and bill group, the system creates one price assignment, one price list, and one price list assignment.

Pricing Group

Oracle Revenue Management and Billing enables you to create pricing groups for a bill group. It consists of one or more rules. Each rule has a unique priority. A rule contains one or more criteria. Each criterion contains source system, parameter 1, parameter 2, parameter 3, and parameter 4. Note that the source system and parameter 1 are mandatory when you are defining a criterion in a rule. You can specify multiple parameter 2, parameter 3, and parameter 4 combinations in the criterion. Once a pricing group is defined, you can then use the pricing group while defining a pricing rule for a bill group. This enables you to define various rates for employees with different set of attributes. For example, in a claim pricing rule, you can maintain different markup and markdown values for employees who belong to the Western, Eastern, and Central location of United States.

Bill Group Sorting

Oracle Revenue Management and Billing allows you to define unique sort IDs for a bill group in a given date range. In future, the sort ID will be used to club transactions based on certain parameters and present them in the bill in the ascending or descending order. It may also be used to sort data while generating various reports.

You can add, edit, and delete a sort ID for a bill group from the **Customer 360° Information** screen. Note that you can delete a sort ID for a bill group only when there are no derivation and pricing parameters defined for the bill group and sort ID combination. You can also upload a set of sort IDs for one or more bill groups at the same time using the **Upload Request** feature. The **Bill Group Sort Upload Request Type (BILL_SRT_UPL_REQ_TYPE)** and **Bill Group Sorting Upload Request (C1-BillGrpSortUploadRequest)** business object are shipped with the product. You can upload the sort IDs for bill groups either from the **Customer 360° Information** or **Upload Request** screen. Note that you can upload the sort IDs for bill groups only using the CSV file format.

While creating an upload request for bill group sort IDs, you need to specify the parent customer whose bill groups' sort IDs you want to upload. Once the upload request is processed, the sort ID is defined for the respective bill group in the system.

Bill Group Derivation and Pricing Parameters

An employer may have different bill groups. Each bill group will handle the claim and enrollment transactions of employees based on the employee attributes, such as location, employment status, employment department, and so on.

Oracle Revenue Management and Billing allows you to define the derivation and pricing parameters, such as source system, parameter 1, parameter 2, parameter 3, and parameter 4 for the bill group and sort record combination. These parameters are used to derive the bill group against which the claim and enrollment transactions should be billed in the system. For example, if you want bill group 1 to handle claim and enrollment transactions of employees who reside in the western location of city and belong to grade A and whose transactions are received from the X system, you need to define derivation and pricing parameters for bill group 1 where the source system is set to X, parameter 1 is set to Western and parameter 2 is set to Grade A. Similarly, if you want bill group 2 to handle claim and enrollment transactions of employees who reside in the eastern location of city and belong to grade A and whose transactions are received from the X system, you need to define derivation and pricing parameters for bill group 2 where the source system is set to X, parameter 1 is set to Eastern and parameter 2 is set to Grade A.

These parameters are also used while defining rules in a pricing group. If a pricing rule is defined for a bill group using a pricing group, you can define more than one price in the pricing rule which is offered based on the attributes of the employees.

The derivation and pricing parameters for the bill group and sort record combination are effective from a particular date. However, the effective date must fall within the date range defined for the sort ID of the bill group.

You can add and edit derivation and pricing parameters for the bill group and sort record combination from the **Customer 360° Information** screen. You can also upload derivation and pricing parameters for one or more bill group and sort record combinations at the same time using the **Upload Request** feature. The Bill Group Derivation Upload Request Type (BILL_LVL_UPL_REQ_TYPE) and Bill Group Derivation and Pricing Parameters Upload Request (C1-BillLevelUploadRequest) business object are shipped with the product. You can upload the derivation and pricing parameters for bill group and sort record combinations from the **Customer 360° Information** or **Upload Request** screen. Note that you can upload the derivation and pricing parameters for bill group and sort record combination only using the CSV file format.

While creating an upload request for derivation and pricing parameters, you need to specify the parent customer whose bill groups' derivation and pricing parameters you want to upload. Once the upload request is processed, the derivation and pricing parameters are defined for the bill group and sort record combination in the system.

ASO Customer Inbound Message

Oracle Revenue Management and Billing enables you to create an ASO customer inbound message using an inbound message type through the following inbound web service:

- **C1-ASOCustomerInboundMessage** - Enables you to add or update a parent customer, bill group, account, ASO policy, and policy plan.

The inbound message type helps the system to determine:

- The business object using which the ASO customer inbound message should be created in the system.
- The business object using which the parent customer and bill group should be created or updated in the system.
- The business object using which the account should be created or updated in the system.
- The policy type which indicates the business object using which the policy should be created or updated in the system.
- The business object using which the policy plan should be created or updated in the system.

On calling the **C1-ASOCustomerInboundMessage** web service, an ASO customer inbound message is created in the **Pending** status. When the **Customer Inbound Message Periodic Monitor (C1-CUSIN)** batch is invoked, the system checks whether there are any ASO customer inbound messages in the **Pending** status. If there is an ASO customer inbound message in the **Pending** status, the system validates the inbound message. If the ASO customer inbound message is successfully validated, it is processed further and the following entities are either created or updated in the system (based on the available information):

- Parent Customer
- Bill Group
- Account
- ASO Policy

- Policy Plan

Once all required entities are created or updated in ORMB, the status of the ASO customer inbound message is changed to **Processed**. If any error occurs while validating or processing an ASO customer inbound message, the status of the ASO customer inbound message is changed to **Rejected**. The system enables you to either reprocess or void a rejected ASO customer inbound message. The system can reprocess an ASO customer inbound message only when its status is changed to **Pending**. Using the **Retry** option, you can change the status of the ASO customer inbound message from **Rejected** to **Pending**. The **Customer Inbound Message Periodic Monitor (C1-CUSIN)** batch will then reconsider and reprocess the ASO customer inbound message. You can also configure the system such that the batch can automatically retry to process the rejected ASO customer inbound messages. However, it will attempt to retry only when the **Maximum Retry** parameter in the **Retry for To Dos (C1-TODORETRY)** algorithm is set to a value greater than zero. Also, the maximum number of times the batch can attempt to retry and reprocess an ASO customer inbound message depends on the value defined in the **Maximum Retry** parameter.

You can also process, void, and retry processing an ASO customer inbound message from the user interface.

Before calling the **C1-ASOCustomerInboundMessage** web service, you must set the following option types in the **C1-ASOBLNG** feature configuration:

- **Bill Group Policy Person Role** – Used to indicate the policy person role using which the bill group should be associated with the policy when the ASO customer inbound message is processed.
- **Parent Customer Policy Person Role** - Used to indicate the policy person role using which the parent customer should be associated with the policy when the ASO customer inbound message is processed.
- **Person Relationship Type** – Used to indicate how the bill group should be related to the parent customer when the ASO customer inbound message is processed.
- **Invoice Type Characteristic Type** – Used to indicate the characteristic type which should be used to store the invoice type for the account.

On creating the policy, a contract of the contract type (which is specified in the ASO Contract Types parameter of the C1-ASOBOPOSP algorithm) is created on the accounts of the policy persons which are associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLNG** feature configuration.

You can also create automatic payment options for the account through an ASO customer inbound message.

Enhancements (Generic)

This section lists the enhancements made to the following features which can be used in both financial services and insurance domains:

- Service Quantity Rule
- Bank and Bank Accounts
- Transaction Feed Management
- Overdue Processing

Service Quantity Rule

The following algorithm types are newly added for the Service Quantity Rule feature:

- **Billable Charges' Service Quantity Summation (SQ)** - This SQ rule algorithm considers all those billable charges of the account whose start date falls within the X months from the bill date, and then adds the service quantities of the Service Quantity Identifiers (SQIs) present on these billable charges. Here, X means the number of previous months whose billable charges' service quantities should be considered during summation. This algorithm is executed during the bill generation. If the SQI on the billable charge and the SQI on the SQ Rule (present in the rate schedule) are same, the service quantity on the corresponding bill segment is updated with the aggregated service quantity. However, if the SQI on the billable charge and the SQI on the SQ Rule (present in the rate schedule) are different, the SQI (available on the SQ Rule) and its service quantities are stamped on the bill segment.

It contains the following parameters:

- **Number of Previous Months** - Used to specify the number of previous months whose billable charges' service quantities should be considered during summation. This parameter is mandatory.
- **Price Item** – Used to indicate the price item whose billable charges' service quantities should be considered during summation.
- **Accounts (Valid Values: SELF, PERSON, U, D, ALL)** – Used to indicate the accounts whose billable charges should be considered during summation. The valid values are:
 - **SELF** – Used when you want to consider billable charges of the respective account.
 - **PERSON** – Used when you want to consider billable charges of all accounts of the person.
 - **U** – Used when you want to consider billable charges of all accounts of the person and its parent persons in the customer hierarchy.
 - **D** - Used when you want to consider billable charges of all accounts of the person and its child persons in the customer hierarchy.
 - **ALL** – Used when you want to consider billable charges of the respective account, all accounts of the person, and all accounts of the parent and child persons in the customer hierarchy.

- **Person to Person Relationship Type** – Used to indicate that you want to consider billable charges of all accounts of the child persons who are related to the parent person using a particular relationship type.
 - **Service Quantity Identifier (SQI)** – Used when you want to sum the service quantities of a particular SQI.
 - **Account Exclusion Characteristic Type** – Used to specify the characteristic type. It is useful when you want to exclude the billable charges of an account during summation. You must specify a characteristic type where the characteristic entity is set to **Account**.
 - **Account Exclusion Characteristic Value** – Used to specify the value of the characteristic type specified in the **Account Exclusion Characteristic Type** parameter which indicates that billable charges of an account should be excluded during summation.
- **Bill Segments' Calculation Lines Summation (SB)** - This SQ rule algorithm considers all bill segments' calc lines of the account whose start date falls within the X months from the bill date, and then adds the calculated amount (in the invoice currency). Here, X means the number of previous months whose bill segments' calc lines should be considered during summation. Note that it considers only those bill segments which are in the **Frozen** status and which are included in the completed bill. This algorithm is executed during the bill generation. If the SQI on the corresponding billable charge and the SQI on the SQ Rule (present in the rate schedule) are same, the service quantity on the bill segment is updated with the aggregated calc line amount. However, if the SQI on the corresponding billable charge and the SQI on the SQ Rule (present in the rate schedule) are different, the SQI (available on the SQ Rule) and its service quantities are stamped on the bill segment.

If the invoice currency of a calc line is different from the account's invoice currency, the system converts the calc line amount into the account's invoice currency (before aggregation) using the currency conversion algorithm which is attached on the respective division.

It contains the following parameters:

- **Number of Previous Months** - Used to specify the number of previous months whose bill segments' calc lines should be considered during summation. This parameter is mandatory.
- **Price Item** – Used to indicate the price item whose bill segments' calc lines should be considered during summation.
- **Accounts (Valid Values: SELF, PERSON, U, D, ALL)** – Used to indicate the accounts whose bill segments should be considered during summation. The valid values are:
 - **SELF** – Used when you want to consider bill segments of the respective account.
 - **PERSON** – Used when you want to consider bill segments of all accounts of the person.
 - **U** – Used when you want to consider bill segments of all accounts of the person and its parent persons in the customer hierarchy.
 - **D** - Used when you want to consider bill segments of all accounts of the person and its child persons in the customer hierarchy.

- **ALL** – Used when you want to consider bill segments of the respective account, all accounts of the person, and all accounts of the parent and child persons in the customer hierarchy.
- **Person to Person Relationship Type** – Used to indicate that you want to consider bill segments of all accounts of the child persons who are related to the parent person using a particular relationship type.
- **Account Exclusion Characteristic Type** – Used to specify the characteristic type. It is useful when you want to exclude the bill segments of an account during summation. You must specify a characteristic type where the characteristic entity is set to **Account**.
- **Account Exclusion Characteristic Value** – Used to specify the value of the characteristic type specified in the **Account Exclusion Characteristic Type** parameter which indicates that bill segments of an account should be excluded during summation.

Bank and Bank Accounts

The following changes are made to the Bank feature:

- The **Bank** screen is completely redesigned to enhance user experience. Now, there are two screens for bank – one allows you to search for a bank and another allows you to:
 - View the details of a bank and its bank accounts
 - Edit and delete a bank
 - Copy a bank along with its bank accounts
 - Add, edit, and delete a bank account
 - View the details and characteristics of a bank account
- You can now define characteristics for each bank account associated with the bank.

Transaction Feed Management

The following changes are made to the Transaction Feed Management feature:

- A new batch named **Identify Transactions for Disaggregation (C1-IDENT)** is introduced in the system. It functions similarly as the **Identify Affected Transactions (C1-IAENT)** batch. Now onwards, you must execute the **Identify Transactions for Disaggregation (C1-IDENT)** batch instead of the **Identify Affected Transactions (C1-IAENT)** batch while disaggregating the transactions. In the next release, the **Identify Affected Transactions (C1-IAENT)** batch will be removed from the system.

The **Identify Transactions for Disaggregation (C1-IDENT)** batch contains the following parameters:

- Division
- Account ID
- Bill Cycle
- Disaggregate Transactions From Date
- Chunk Size

- Maximum Batch Count
- Post-Processing Algorithm
- Exclude Canceled Billable Charges (Y or N)
- Thread Pool Name

For more information about the batch, refer to *Oracle Revenue Management and Billing TFM – Batch Execution Guide*.

- A new batch named **Update Disaggregation Request Status (C1-DRSUA)** is introduced in the system. It functions similarly as the **Update Disaggregation Request Status (C1-DARSU)** batch. Now onwards, you must execute the **Update Disaggregation Request Status (C1-DRSUA)** batch instead of the **Update Disaggregation Request Status (C1-DARSU)** batch while disaggregating the transactions. In the next release, the **Update Disaggregation Request Status (C1-DARSU)** batch will be removed from the system.

The **Update Disaggregation Request Status (C1-DRSUA)** batch contains the following parameters:

- Division
- Account ID
- Bill Cycle
- Disaggregate Transactions From Date
- Chunk Size
- Maximum Batch Count
- Post-Processing Algorithm
- Exclude Canceled Billable Charges (Y or N)
- Thread Pool Name

For more information about the batch, refer to *Oracle Revenue Management and Billing TFM – Batch Execution Guide*.

- The following new option types are added in the **C1_FM** feature configuration:
 - Disaggregation – Price Assignment
 - Allow Duplicate Summary ID
 - Parallel Query Degree
 - Remove Duplicates from Accumulated Rule Output
 - Rule Output Accumulation
 - Populate Summary Table Batch Description
 - Use C1-TXNPS During Transaction Aggregation

For more information about these option types, refer to the **Setting the C1_FM Feature Configuration** section in *Oracle Revenue Management and Billing Banking User Guide* or *Oracle Revenue Management and Billing Insurance User Guide*.

- The following option types in the **C1_FM** feature configuration are renamed:

Option Type (in 2.6.0.1.0)	Renamed To (in 2.7.0.0.0)
Batch Control - First Run	First Batch in Transaction Aggregation Cycle
Batch Control - Last Run	Last Batch in Transaction Aggregation Cycle
Product Tou derivation Batch Description	Price Item Determination Batch Description
Feed Management Used	Show Default Values in Price Item Pricing
Materialized Views Used	Use Materialized Views
Max. No of Product Parameters Cache Size	Maximum Price Item Parameters Cache Size
Max Price Item Parameter Group Cache Size	Maximum Price Item Parameter Groups Cache Size
Verify Pricing Batch Description	Find Price Item Pricing Batch Description
Update Error Transaction Batch Description	Update Transaction Status Batch Description
Transaction Cleanup Batch Description	Cleanup Unwanted Data Batch Description

- The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch locks the **CI_TXN_DTL_PRITM_SUMMARY** table before inserting records to ensure that only unique records are inserted in this table. The locking mechanism results in performance issue when there is no or very little aggregation of transactions. Therefore, we recommend you to use an alternative transaction aggregation process when the aggregation ratio is low. You can enable the alternative transaction aggregation process by setting the **Use C1-TXNPS During Transaction Aggregation** option type in the **C1_FM** feature configuration to **true**. In this alternative transaction aggregation process, you need to execute the following batches in the specified order:
 1. Flush All Caches (F1-FLUSH)
 2. Refresh Pricing (C1-TXNRP)
 3. Header Validation (C1-TXNHV)
 4. Validate Transaction and Derive Price Item (C1-TXNIP)
 5. Populate CI_TXN_DTL_PRITM_SUMMARY Table (C1-TXNPS)
 6. Price Item Pricing Verification (C1-TXNVP)
 7. Update Status (C1-TXNEX)
 8. Service Quantity Calculation (C1-TXNSQ)
 9. Mark Completion (C1-TXNCM)
 10. Clean Up (C1-TXNCU) with the **Request Type** parameter set to **EROR**

- A new batch named **Populate CI_TXN_DTL_PRITM_SUMMARY Table (C1-TXNPS)** is introduced in the system. It is used to add one record for a set of transaction legs (which are in the **Initial Price Item Determined (INPD)** status and which have the same account, price item, variance parameter or parameter group ID, transaction date, processing date, and aggregation parameter group ID) in the **CI_TXN_DTL_PRITM_SUMMARY** table. The status of the record is set to **I**. The summary ID is generated automatically for each record.

You must execute the **Populate CI_TXN_DTL_PRITM_SUMMARY Table (C1-TXNPS)** batch only when the **Use C1-TXNPS During Transaction Aggregation** option type in the **C1_FM** feature configuration is set to **true**.

For more information about this batch, refer to *Oracle Revenue Management and Billing TFM – Batch Execution Guide*.

- Initially, the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch used to create the summary record in the **CI_TXN_DTL_PRITM_SUMMARY** table. Now, it will create summary record in the **CI_TXN_DTL_PRITM_SUMMARY** table only when the **Use C1-TXNPS During Transaction Aggregation** option type in the **C1_FM** feature configuration is set to **false**.

However, if the **Use C1-TXNPS During Transaction Aggregation** option type in the **C1_FM** feature configuration is set to **true**, the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch adds a hash value in the **SUMM_HASHCODE** column corresponding to each transaction leg in the **CI_TXN_DTL_PRITM** table. A hash value is computed using the oracle function named **ORA_HASH()**. This function uses the following columns of the **CI_TXN_DTL_PRITM** table to compute the hash value for each transaction leg:

- ACCT_ID
 - INITIAL_PRICE_ITEM_CD
 - INTIAL_TOU_CD
 - PRICEITEM_PARM_GRP_ID
 - AGG_PARM_GRP_ID
 - TXN_DTTM
 - PROCESSING_DT
- The following parameters are newly added in the **Header Validation (C1-TXNHV)** batch:
 - Allow Positive Transaction Volume in Header
 - Allow Negative Transaction Volume in Header
 - Allow Zero Transaction Volume in Header

For more information about these batch parameters, refer to *Oracle Revenue Management and Billing TFM – Batch Execution Guide*.

- A new parameter named **Shuffle Work Unit** is added in the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch. It indicates whether you want to shuffle the work units across threads to correct the uneven thread processing time. The valid values are:
 - Y
 - N

- Normally, in the Transaction Feed Management feature, the transaction legs are created using the output parameters of the rule where the criteria returns **Rule Is True** and the rule true action is set to **Success**. Oracle Revenue Management and Billing also enables you to accumulate the output parameters of all rules where the criteria returns **Rule Is True** irrespective of whether the rule true action is set to **Next Dependent**, **Next Rule by Priority**, or **Success**. This accumulation process continues until a rule is executed where the criteria returns **Rule Is True** and the rule true action is set to **Success**. Once the output parameters are accumulated, the transactions legs are created using these accumulated output parameters. You can enable the rule output accumulation feature for the Transaction Feed Management module by setting the **Rule Output Accumulation** option type in the **C1_FM** feature configuration to **true**.

There might be situations when duplicate transaction legs are created through the rule output accumulation process. The system enables you to indicate whether duplicate transaction legs must be created through the rule output accumulation process during the transaction aggregation cycle. If the **Remove Duplicates from Accumulated Rule Output** option type in **C1_FM** feature configuration is set to **true**, the system does not create duplicate transaction legs during the transaction aggregation cycle.

- The following batches in the transaction aggregation process are enhanced to support the ASO billing:
 - Transaction Validation and Initial Price Item Determination (C1-TXNIP)
 - Price Item Pricing Verification (C1-TXNVP)
 - Update Status (C1-TXNEX)
 - Service Quantity Calculation (C1-TXNSQ)
- A new field named **Pricing Rule Type** is added in the **Transaction Record Type** screen. If you want to use a transaction source and transaction record type combination for processing the claim or enrollment transactions, you must specify the respective primary pricing rule type (i.e. claim or retention type enrollment based pricing rule type) in the transaction record type. However, if you want to use a transaction source and transaction record type combination for processing the banking transactions, you must specify the rule type in the transaction record type.
- Once the **Transaction Validation and Initial Price Item Determination (C1-TXNIP)** batch is executed, it validates the transaction records. Once the transaction records are validated successfully, it checks whether a pricing rule type is specified in the transaction record type. If a pricing rule type is not specified in a transaction record type, it invokes business rules using the rule type which is specified in the transaction record type. However, if a primary pricing rule type is specified in a transaction record type, the system executes the following algorithms attached in the pricing rule type in the specified sequence:
 1. **Transaction Validation** – An algorithm type for validating a transaction is not shipped from the product. You need to create a custom algorithm type, if required.

2. **Bill Group Derivation** – This algorithm derives the bill group, parent customer, and policy for the transaction. To derive a bill group, it first determines the derivation date. The following table indicates the date which is considered as the derivation date while processing various transactions:

Transaction Type	Derivation Date
Claim	Paid Date
Retro Enrollment	Coverage End Date
Non-Retro Enrollment	Coverage Start Date

Depending on the transaction fields which are mapped to source system, parameter 1, parameter 2, parameter 3, and parameter 4 in the primary pricing rule type, the system derives the data from the transaction. Based on the data available in the transaction (such as, source system, parameter 1, parameter 2, parameter 3, or parameter 4), the system derives the bill group and sort record combination which is effective on the derivation date. For example, if the claim transaction is fetched from the X source system and belongs to the Western location of Mumbai, the system derives the bill group where the source system is set to X and parameter 1 (which is mapped to Location) is set to Western on the derivation date.

Once the bill group is derived, the system checks whether the paid date of the claim transaction falls within the policy start date and runout end date of any policy which belongs to the bill group. If so, it derives the policy for the bill group irrespective of its status (i.e. In Force/Active, Runout or Post Runout). In case of retro enrollment transactions, the system checks whether the coverage end date falls within the policy start date and policy end date of any active policy which belongs to the bill group. If so, it derives the active policy for the bill group. However, in case of non-retro enrollment transactions, the system checks whether the coverage start date falls within the policy start date and policy end date of any active policy which belongs to the bill group. If so, it derives the active policy for the bill group.

3. **Account and Price Item Derivation** – This algorithm fetches effective pricing rule for each price item and price item parameters combination on the derivation date. First, it searches for effective pricing rule for a price item defined for the policy at the bill group level. If the system does not find any effective pricing rule for a price item defined for the policy at the bill group level, it inherits the effective pricing rule for a price item from the parent customer. A transaction is mapped to a price item and price item parameters combination only when the effective pricing rule is derived for the price item. Once the pricing rule is derived for the price item, the account with a particular invoice type is derived based on the priority and mapped to the transaction. The system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing.

4. **Pricing Rule Post Processing** – This algorithm is triggered when the effective pricing rule is derived for the price item. A post-processing algorithm type is not shipped from the product. You need to create a custom algorithm type, if required.

Once a transaction is mapped to one or more price item, price parameters, and account combination based on the primary pricing rule type, the system then executes the algorithms attached to the related pricing rule types in the specified sequence:

1. Transaction Validation
2. Account and Price Item Derivation

Note: The account and price item derivation process of the primary and related pricing rule types is same except for the date which is used for deriving the effective pricing rule. For the retention type claim based pricing rule type, this algorithm fetches effective pricing rule for each price item and price item parameters combination on the paid date. However, for the specific stop-loss and aggregate stop-loss pricing rule type, this algorithm fetches the pricing rule for each price item and price item parameters combination only when incurred and paid date of the transaction falls with the incurred and paid date ranges defined in the respective pricing rule type.

3. Pricing Rule Post Processing
 - In case of the claim and enrollment transactions, the **Price Item Pricing Verification (C1-TXNVP)** batch stamps the price assignment based on the pricing rule for each transaction leg in the CI_TXN_DTL_PRITM_SUMMARY table. In addition, if there are multiple active contracts, the algorithm attached to the **Contract Derivation** system event of the division to which account belongs is executed. It derives the contract which is associated with the policy and maps it to the transaction leg.

If the algorithm is attached to the **Feed Management Verify Pricing Post-Processing** system event of the division to which account belongs, the system removes the price assignment ID and price item parameter group ID from the summary ID column of each transaction leg.

- The following algorithm types are newly shipped with the product:
 - SA_DERV_POPC
 - C1-VRPR_POPC
 - C1_BCHG_POPC
- Once the **Service Quantity Calculation (C1-TXNSQ)** batch is executed, the algorithm attached to the **Feed Management Billable Charge Post-Processing** system event of the division to which the account belongs is executed. It invokes the algorithm which is attached to the **Bill After Date Determination** system event in the respective pricing rule type.
- The following system events are added in the **Algorithms** tab of the **Division** screen:
 - Contract Derivation
 - Feed Management Verify Pricing Post-Processing
 - Feed Management Billable Charge Post-Processing

Overdue Processing

A new parameter named **Currency** is added in the **C1-OE-WOB** algorithm type. It is used to indicate the currency of the maximum total unpaid amount which is specified in the **Write Off if Unpaid Less Than or Equal To** parameter. If the currency specified in this parameter is different from the account's invoice currency, the maximum total unpaid amount is first converted into the account's invoice currency and then the system checks whether the total unpaid amount of the overdue bills is less than or equal to the maximum total unpaid amount (which is converted into the account's invoice currency). If you do not specify the value for this parameter, the system sets the currency of the maximum total unpaid amount to the one specified in the installation options. However, in such case, the system does not convert the maximum total unpaid amount to the account's invoice currency when the currency specified in the installation options is different from the account's invoice currency.

Enhancements (Specific to Financial Services)

This section lists the enhancements made to the following features which can be used in the financial services domain:

- Customer 360° View

Customer 360° View

The following changes are made to Customer 360° View feature:

- The **Customer 360-Degree View** menu is renamed to **Customer 360° View**.
- The following two zones are added in the **Person** tab of the **Customer 360° Information** screen:
 - **Enrolled Products** – Lists the products to which the person's accounts are enrolled.
 - **Product Enrollment Information** – Lists the accounts which have enrolled for the product version.
- The **Enrolled Products** zone is added in the **Account** tab of the **Customer 360° Information** screen. It allows you to view the list of products and its product version to which the account is enrolled.
- The following two zones are added in the **Product and Pricing** tab of the **Customer 360° Information** screen:
 - **Product** – The information displayed in this zone vary depending on whether you navigate to the **Product and Pricing** tab from the **Person** or **Account** tab. If you click the **360 Degree Information** icon corresponding to the product in the **Enrolled Products** zone of the **Person** tab, the details of the product (such as, its product versions and products, product services and add-on product services in the respective product version) are listed in the tree view. However, if you click the **360 Degree Information** icon corresponding to the product in the **Enrolled Products** zone of the **Account** tab, the details of the respective enrolled product version (such as, enrolled products, enrolled product services and enrolled add-on product services) are listed in the tree view.
 - **Associated Price Items** - The information displayed in this zone vary depending on whether you navigate to the **Product and Pricing** tab from the **Person** or **Account** tab. If you click the **360 Degree Information** icon corresponding to the product in the **Enrolled Products** zone of the **Person** tab, a list of price items associated with the product services appears in this zone. However, if you click the **360 Degree Information** icon corresponding to the product in the **Enrolled Products** zone of the **Account** tab, a list of price items associated with the enrolled product services and add-on product services appears in this zone.

Enhancements (Specific to Insurance)

This section lists the enhancements made to the following features which can be used in the insurance domain:

- Deferred Revenue Recognition
- Customer 360° View

Deferred Revenue Recognition

The following changes are made to the Deferred Revenue Recognition feature:

- You can now create deferred revenue recognition for a financial transaction manually from the user interface.
- The **Deferred Revenue Recognition** sub-menu is added. It has two menu options – **Search** and **Add**.
- You can now search for a deferred revenue recognition using the financial transaction ID.
- You can now define characteristics for a deferred revenue recognition template. These characteristics are valid for deferred revenue recognitions which are created using the deferred revenue recognition template.
- Earlier, you were able to create a deferred revenue recognition template for each distribution code and contract type combination. However, now, you are able to create a deferred revenue recognition template for each distribution code, contract type, and division combination.
- If you are already using the Deferred Revenue Recognition feature and want to upgrade to the ORMB V2.7.0.0.0, you need to execute the **Revenue Recognition Division Upgrade Batch (C1-RRDIV)** batch to migrate the data from the previous release to the new release. It considers all existing deferred revenue recognitions which are in the **Active** status. It then checks whether the corresponding deferred revenue recognition template is associated to any division. If the deferred revenue recognition template is not associated to any division, it derives the division from the contract for which the deferred revenue recognition is created and then associates the division with the respective deferred revenue recognition template. In this process, the deferred revenue recognition template might be associated with one or more divisions.

Customer 360° View

The following changes are made to Customer 360° View feature:

- The **Customer 360-Degree View** menu is renamed to **Customer 360° View**.
- Until now, the **Customer 360° View** screen enabled you to quickly view in-depth information of the fully insured customers. Now, in addition, it enables you to quickly view in-depth information of the ASO customers.
- You can use the person, account, or policy details to search and view the 360-degree information of the ASO customers.

The following table lists the information that you can view depending on the person type of the customer:

Person Type	Then, the Customer 360° Information screen displays...
Parent Customer	<ul style="list-style-type: none"> • Basic details, characteristics, child persons, billing hierarchy, bill group derivation and pricing parameters, bill group sorting records, and customer contacts of the parent customer • List of accounts of the bill groups who are effective child persons of the parent customer • Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the respective bill group account • Consolidated view of the transactions (such as, billing, payment, payment cancellation, adjustment, adjustment cancellation, automatic payments sent to the auto clearing house for review, refund, write off, and excess credit) which are carried out for the respective bill group account • Basic details of the policy where the parent customer is the policy holder, the related persons and policy plans in the policy <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Note: One of the policies of the parent customer's bill group is randomly picked up and its details are shown in the Policy tab.</p> </div> <ul style="list-style-type: none"> • List of pricing rules defined for the parent customer • List of pricing rules defined for each policy of the bill groups in the tree view • List of policies defined for each bill group and pricing rules defined for each policy of the bill group • List of pricing groups defined for each bill group
Bill Group	<ul style="list-style-type: none"> • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the bill group • Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the bill group's account • Consolidated view of the transactions (such as, billing, payment, payment cancellation, adjustment, adjustment cancellation, automatic payments sent to the auto clearing house for review, refund, write off, and excess credit) which are carried out for the bill group's account • Basic details of the policy which belongs to the bill group, the related persons and policy plans in the policy • List of pricing rules defined for the parent customer in a tree view

Person Type	Then, the Customer 360° Information screen displays...
	<ul style="list-style-type: none"> List of policies defined for the bill group and pricing rules defined for each policy List of pricing groups defined for the bill group

In addition, it displays the following information in a graphically presentation:

- Number of customer contacts created for the account's main customer in a particular month
- Number of bills created for the account in a particular month
- Number of payments created for the account in a particular month

For each unpaid bill of the account, you can view the following:

- Basic details of the bill
- Adjustments which are swept onto the bill
- Activities (such as, payment, offset, refund, or write off) through which the bill is settled
- High level summary and details of the bill segments included the bill
- Active hold requests due to which the bill is kept on hold
- Offset requests through which the bill is offset against another bill
- Refund and write off requests through which the bill or its bill segment is either refunded or written off

In other words, this feature allows you to drill down to see or act on all current and historical revenue management and billing details. This allows you to professionally and efficiently handle customer inquiries and complaints at the first point of contact, raising your customer service from previously unattainable levels and reducing the associated time and cost.

- When you are viewing the details of a parent customer, the information of those bill groups appear who are effective child persons of the parent customer and are related to the parent customer using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLNG** feature configuration.
- The following table lists the zones which appear in the **Customer 360° Information** screen when you search for a fully insured and ASO customers:

Tab Name	Zone Name	Fully Insured	ASO Parent Customer	ASO Bill Group
Person	Person Information	✓	✓	✓
	Person Characteristics	✓	✓	✓
	Person Child Information	✓	✓	✓
	Person Hierarchy	✓	✗	✗
	Person Billing Hierarchy	✗	✓	✓
	Bill Group Derivation and Pricing Parameters	✗	✓	✗

Tab Name	Zone Name	Fully Insured	ASO Parent Customer	ASO Bill Group
	Bill Group Sorting	x	✓	x
	Customer Contacts	✓	✓	✓
Account	Bill Group Accounts	x	✓	x
	Account Information	✓	✓	✓
	Account Characteristics	✓	✓	✓
	Administrative Contracts	✓	x	x
	Auto Pay Details	✓	✓	✓
	Account Financial and Collections Summary	✓	✓	✓
	Billing and Adjustment Summary	✓	x	x
	Open Bills	✓	✓	✓
	Billed Vs Paid	✓	✓	✓
	Timeline	✓	✓	✓
Policy	Policy Information	✓	✓	✓
	Other Related Persons	✓	✓	✓
	Policy Plan	✓	✓	✓
	Packaged Savings Code	✓	x	x
Pricing	Parent Customer Pricing Rules	x	✓	x
	Bill Group Policy Pricing Rule Summary	x	✓	✓
	Bill Group Policy Information	x	✓	✓
	Bill Group Policy Pricing Rules	x	✓	✓
	Bill Group Pricing Groups	x	✓	✓
	Parent Person Pricing Rule Summary	x	x	✓

- The following zones are newly introduced in this release for ASO customers:
 - **Person Billing Hierarchy** – Lists the following in a tree view:
 - Information string of a bill group who is child person of the parent customer
 - Information string of a policy which is defined for the bill group
 - Information string of an account where the bill group is the main customer
 - **Bill Group Sorting** – Displays the sort IDs defined for the parent customer’s bill groups. It also allows you to define, edit, delete, and upload sort IDs for the parent customer’s bill group.

- **Bill Group Derivation and Pricing Parameters** – Displays the derivation and pricing parameters defined for the bill group and sort record combination. It also allows you to add, edit, and upload the derivation and pricing parameters for the bill group and sort record combination.
- **Bill Group Accounts** - Lists the accounts of the bill groups who are child persons of the parent customer.
- **Parent Customer Pricing Rules** - Lists the pricing rules defined for the parent customer. It also allows you define, edit, and delete the pricing rules of the parent customer.
- **Bill Group Policy Pricing Rule Summary** - Lists the pricing rules defined for each policy of each bill group in the tree view.
- **Bill Group Policy Information** - Lists the policies defined for each bill group of the parent customer
- **Bill Group Policy Pricing Rules** - List the pricing rules defined for each policy of the bill group. It allows you to define a pricing rule for a bill group with or without using the pricing group. In addition, it allows you to edit and delete the pricing rules of the bill group.
- **Bill Group Pricing Groups** – Lists the pricing groups defined for the bill group. It also allows you to define, edit, and delete the pricing groups of the bill group.
- **Parent Person Pricing Rule Summary** – Lists the pricing rules defined for the parent customer in a tree view.
- For fully insured customers, no data will appear in the **Pricing** tab.
- You can also renew a policy by clicking the **Renew** icon corresponding to the policy in the **Bill Group Policy Information** zone.

User Interface (UI) Level Changes

The following table lists changes made to the existing screens in Oracle Revenue Management and Billing:

Screen Name (in 2.6.0.1.0)	Changes
Deferred Revenue Recognition (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Financial Transaction Details option is added in the Search By list. • The Add button is added in the Page Title area.
Deferred Revenue Recognition Template (Used for Adding)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Allow Editing Recognition Schedule field is renamed to Allow Editing. • The Recognition Schedule Generation Type field is renamed to Generation Type. • The Divisions and Characteristics sections are added in this screen.
Deferred Revenue Recognition Template (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Allow Editing Recognition Schedule field is renamed to Allow Editing. • The Recognition Schedule Generation Type field is renamed to Generation Type. • The Divisions and Characteristics sections are added in this screen.
Customer 360-Degree View (Banking)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • This screen is renamed to Customer 360° View. • The 360-Degree Search zone is renamed to 360° Search.
Customer 360-Degree Information (Banking)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • This screen is renamed to Customer 360° Information. • The Pricing tab is renamed to Product and Pricing tab. • The Search By field is added in the Linked Accounts zone of the Person tab. • The Enrolled Products and Product Enrollment Information zones are added in the Person tab. • The Enrolled Products zone is added in the Account tab.

Screen Name (in 2.6.0.1.0)	Changes
	<ul style="list-style-type: none"> The Product and Associated Price Items zones are added in the Product and Pricing tab.
Customer 360-Degree View (Insurance)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> This screen is renamed to Customer 360° View. The 360-Degree Search zone is renamed to 360° Search. The Policy Person Role, Person Name, and Status fields are removed from the Advanced Policy Search option and added in the Basic Policy Search option.
Customer 360-Degree Information (Insurance)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Person Billing Hierarchy, Bill Group Derivation and Pricing Parameters, and Bill Group Sorting zones are added in the Person tab. The Bill Group Accounts zone is added in the Account tab. The Renewal Date, Runout End Date, and Runout Administration Fees fields are added in the Main section of the Policy Information zone. The Pricing tab is added in this screen.
Policy (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Renewal Date, Runout End Date, and Runout Administration Fees fields are added in the Main section of the Policy zone. The Runout button is added in the Record Actions section of the Policy zone.
Policy (Used for Adding)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Runout End Date and Runout Administration Fees fields are added in this screen.
Person	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Parent Customer and Bill Group options are added in the Person Type list.
Account	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Product field is removed from the Main tab.
Price Item Pricing (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Pricing Rule Type field is added in the Pricing Information section of the Price Item Pricing zone. The Two-Dimensional Pricing zone is added in this screen. It appears only when the Two-Dimensional option is selected from the Pricing Rule Type list.

Screen Name (in 2.6.0.1.0)	Changes
Price Item Pricing (Used for Adding and Editing)	The following changes are made to this screen: <ul style="list-style-type: none">• The Pricing Rule Type field is added in the Main section.
Bill Charge Line Type	The following changes are made to this screen: <ul style="list-style-type: none">• The Bill Charge Line Type menu is renamed to Billable Charge Line Type.• This screen is renamed to Billable Charge Line Type.• The Bill Charge Line External Type field is renamed to Billable Charge Line Type.• The Description field is renamed to Description on Bill.• The App in Summary field is renamed to Appears in Summary.

Database Level Changes

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) that are newly added in Oracle Revenue Management and Billing Version 2.7.0.0.0, refer to the Appendix A : New Objects in the Oracle Revenue Management and Billing V2.7.0.0.0 Database section in *Oracle Revenue Management and Billing Database Administrator's Guide*.

Supported Platforms

The following table lists the operating system and application server combinations on which Oracle Revenue Management and Billing Version 2.7.0.0.0 is supported:

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
Windows 7, 8.1, 10 (64-bit) with Internet Explorer 11.x	AIX 7.2 TL0 (64-bit)	POWER 64-bit	WebLogic 12.2.1.x (64-bit)	Oracle Database Server 12.1.0.2 Oracle Database Server 12.2.0.1
	Oracle Linux 6.5+ and 7.x (64-bit)	x86_64	WebLogic 12.2.1.x (64-bit)	Oracle Database Server 12.1.0.2 Oracle Database Server 12.2.0.1
	Sun Solaris 11	SPARC 64-bit	WebLogic 12.2.1.x (64-bit)	Oracle Database Server 12.1.0.2 Oracle Database Server 12.2.0.1
	Red Hat Enterprise Linux ¹ 6.5+ and 7.x (64-bit)	x86_64	WebLogic 12.2.1.x (64-bit)	Oracle Database Server 12.1.0.2 Oracle Database Server 12.2.0.1
	Windows Server 2012 R2 (64-bit)	x86_64	WebLogic 12.2.1.x (64-bit)	Oracle Database Server 12.1.0.2 Oracle Database Server 12.2.0.1

Note: We strongly recommend you to install Oracle Revenue Management and Billing (ORMB) on Windows platform only for non-production activities, such as User Acceptance Testing (UAT), development setup, and so on.

¹ Oracle Revenue Management and Billing is tested and certified on Oracle Linux 6.5+ and 7.x. Oracle Linux is 100% userspace-compatible with Red Hat Enterprise Linux, and therefore Oracle Revenue Management and Billing is supported on Red Hat Enterprise Linux.

Technical Recommendations

To improve the overall batch performance on Windows and Linux platforms, we recommend you to make changes in the following files:

File Name	Change From	Change To
hibernate.properties	hibernate.c3p0.timeout = 300	hibernate.c3p0.timeout = 600
threadpoolworker.sh	MEM_ARGS="-Xms512m -Xmx1024m -XX:MaxPermSize=768m"	MEM_ARGS="-Xms512m -Xmx4096m -XX:MaxPermSize=768m"

Supported Upgrades

At present, we support upgrade from Oracle Revenue Management and Billing Version 2.6.0.1.0 to 2.7.0.0.0. For more information on how to upgrade, refer to the following documents which are available on OTN:

- *Oracle Revenue Management and Billing Version 2.7.0.0.0 Upgrade Guide*
- *Oracle Revenue Management and Billing Version 2.7.0.0.0 Upgrade Path Guide*

For upgrading from any other version of Oracle Revenue Management and Billing other than 2.6.0.1.0, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.

Deprecation Notices for ORMB Version 2.7.0.0.0

This section describes items that are deprecated in this release and planned for deprecation in a future release of Oracle Revenue Management and Billing. It contains the following topics:

- Depreciated Functionality in This Release
- Depreciated Out-of-Box ORMB – PeopleSoft Integration Package
- Deprecation Planned for Future Releases

Depreciated Functionality in This Release

The Product feature and related screens are deprecated in this release. Alternatively, you can use the Product Lifecycle Management (PLM) feature which is introduced in this release.

Depreciated Out-of-Box ORMB – PeopleSoft Integration Package

Until now, Oracle Revenue Management and Billing provided an out of box integration with Oracle PeopleSoft Enterprise Financial Management for General Ledger and Accounts Payable using the Oracle Data Integrator tool. Now onwards, this out of box integration with PeopleSoft is no longer supported by the product team. You can still integrate Oracle Revenue Management and Billing with PeopleSoft using the implementation team's expertise.

Deprecation Planned for Future Releases

The following features are scheduled to be removed in a future release of Oracle Revenue Management and Billing:

- **TOU (Variance Parameter) Based Pricing** – We strongly recommend you to use the multi parameter based pricing feature instead of the TOU based pricing feature.
- **Billable Charge Creation Using UOM** – At present, there is one-to-one relationship between UOM and price item. Therefore, you are able to create a billable charge using either UOM or price item. In a future release, the system will not allow you to search price item pricing using UOM. Therefore, we strongly recommend you to create pass through or service quantity based billable charges using price item.
- **Legacy mechanism to upload pass through billable charges using the BCU1 and BCU2 batches** - We have introduced the **On Demand Billing feature which allows you to upload both pass through and rate based billable charges**. We strongly recommend you to start using the On Demand Billing feature for uploading pass through and rate based billable charges.

- **XAI Inbound Services** - This has already been superseded by the Inbound Web Services functionality. For more information on migrating from XAI to IWS, please refer to *Migrating from XAI to IWS Oracle Utilities Application Framework* (Doc ID 1644914.1) on [My Oracle Support](#).

The following table lists the objects which will be deprecated in the next release of Oracle Revenue Management and Billing:

Object Type	Object Name								
Algorithm Type	C1_CURALG, C1-MDOV-BILL, C1-MDOV-BSEG, C1-MDOV-ONSA, SA_DERV_POPC								
Feature Configuration	C1_EX_ROUND								
Option Types	Currency Conversion Algorithm and Payment Distribution To-Do (from the C1_MLTCURACC feature configuration)								
Table Columns	<p>The following table lists the columns which will be deprecated in the next release:</p> <table border="1"> <thead> <tr> <th>Table Name</th> <th>Column Name</th> </tr> </thead> <tbody> <tr> <td>CI_ACCT_PER</td> <td>BILL_RTE_TYPE_CD, RECEIVE_COPY_SW, BILL_FORMAT_FLG, NBR_BILL_COPIES, CUST_PO_ID, NOTIFY_SW, and BILL_ADDR_SRCE_FLG</td> </tr> </tbody> </table>	Table Name	Column Name	CI_ACCT_PER	BILL_RTE_TYPE_CD, RECEIVE_COPY_SW, BILL_FORMAT_FLG, NBR_BILL_COPIES, CUST_PO_ID, NOTIFY_SW, and BILL_ADDR_SRCE_FLG				
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Batch Control	<p>GLASSIGN, GLASSGN1, GLASSGN2, C1-IAENT, C1-DARSU</p> <p>The following table lists the new batch controls that you must use instead of the above batches:</p> <table border="1"> <thead> <tr> <th>Batch Control (Planned for Deprecation)</th> <th>New Batch Control</th> </tr> </thead> <tbody> <tr> <td>GLASSIGN, GLASSGN1, GLASSGN2</td> <td>C1-GLASN</td> </tr> <tr> <td>C1-IAENT</td> <td>C1-IDENT</td> </tr> <tr> <td>C1-DARSU</td> <td>C1-DRSUA</td> </tr> </tbody> </table>	Batch Control (Planned for Deprecation)	New Batch Control	GLASSIGN, GLASSGN1, GLASSGN2	C1-GLASN	C1-IAENT	C1-IDENT	C1-DARSU	C1-DRSUA
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GLASSIGN, GLASSGN1, GLASSGN2	C1-GLASN								
C1-IAENT	C1-IDENT								
C1-DARSU	C1-DRSUA								
View	CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW								
Business Service	<p>C1-EffectivePricing, C1_PriceParmBS</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note: Instead of using the C1-EffectivePricing business service, use the C1-GetEffectivePricing business service to view the data on the Pricing (Account) and Pricing (Person) screens. Similarly, instead of using the C1_PriceParmBS business service, use the C1_PRICE_PARM business object to add, edit, copy, and delete a parameter.</p> </div>								

Object Type	Object Name
Service Program	EFFPRCSERVICE, C1_PRICEPARM

Therefore, henceforth, we strongly recommend you not to use these objects in any custom implementation.

Product Documentation

User manuals and other technical documents are available in the Portable Document Format (PDF). You can download Oracle Revenue Management and Billing release specific documentation library (for example, Oracle Revenue Management and Billing Version 2.7.X.X.X Documentation Library) using the following URL:

<http://www.oracle.com/technetwork/indexes/documentation/fsgbu-1364781.html>

Media Pack Download

Oracle Financial Services Revenue Management and Billing Version 2.7.0.0.0 and Oracle Insurance Revenue Management and Billing Version 2.7.0.0.0 media packs can be installed on the following supported platforms:

- AIX (64-bit)
- Microsoft Windows (64-bit)
- Linux (64-bit)
- Sun Solaris (64-bit)

The media pack includes multiple packages. For more information, refer to the Media Pack Contents section in the Oracle Revenue Management and Billing Version 2.7.0.0.0 Quick Installation Guide.

To download a package from a media pack:

1. Login to [Oracle Software Delivery Cloud](#).
2. Type **Oracle Financial Services Revenue Management and Billing** or **Oracle Insurance Revenue Management and Billing** in the **Search By** field.
3. Click **Select Platform**. A window appears which lists all supported platforms.
4. Select the required platform check box and then click **Select**. A row appears in the **Selected Products** list.
5. Click **Continue**. A page appears with the most recent release of the product.

Note: If you want to use any previous release of the product which is available on Oracle Software Delivery Cloud, use the Select Alternate Release link.

6. Click **Continue**. A window appears with the license agreement.
7. Scroll and read the full license agreement and then click the **I have reviewed and accept the terms of the Commercial License, Special Programs License, and/or Trial License** check box.
8. Click **Continue**. The **File Download** window appears.
9. Select the required package that you want to download from the media pack and then click **Download**. The **Download Manager Installation** window appears.
10. Click **Download the installer**. A message appears confirming whether you want to open or save zip file.
11. Select the **Save As** option from the **Save** list. The **Save As** dialog box appears.
12. Browse to the location where you want to download the package and then click **Save**. The package is downloaded on your local machine.

Bug Fixes

The following table lists the bugs that are fixed in this release:

Bug Number	Copy of (Base Bug)	Description
26728097	-	CONTEXT MENU - ACCOUNT DETAILS
27851105	-	FORWARD PORT : BUG 27807283
27822273	27613413	PRICE ITEM UI ISSUES WITH DETERMINE BO
27837964	27162181	PAYMENT ENTITY ON RMB UI, UPDATING FOR CHAR_VAL BUT NOT FOR SRCH_CHAR_VAL
27935997	27820241	SLOWNESS OBSERVED WHILE INSERTING PERSON-PERSON RELATIONSHIP USING PERSONPERSON_
27075664	27635537	POST PROC BILL SEG CREATED IN ERR FOR INHERITED PRODUCTS
27626347	27552974	ERROR LOADINGERROR LOADING CLASS COM.SPLWG.BASE.API.PROGRAM.STANDARD._.RECOR
27830725	27529334	OBJECTS ARE INVALID DUE TO MISSING THE SEQUENCE
27820457	27778854	FORWARD PORT : BUG 27778854
27820428	27728995	FORWARD PORT : BUG 27728995
27977061	27881957	OFFSET REQUEST - VIEW ADJUSTMENT PAGE NOT DISPLAYING CORRECT AMOUNT VALUE
27966953	27774043	PATCH 27582063: FOR 2.6 ENVIRONMENT DID NOT RESOLVE ISSUE IN PRODUCTION
27917703	27825030	PAYMENT AGREEMENT REQ CHANGED TO"BROKEN PROMISE" STATUS ISSUE AT BOUNDARY DATE
27838074	26997503	QUERY TIMEOUT ON REFUND REQUEST PAYMENT TAB WHILE TRYING TO REFUND OVERPAYMENT
27814093	27802865	LAST BILLED COVERAGE COLUMN SHOWS INCORRECT BILL SEGMENT RESULT
27917755	27846201	PAYMENT AGREEMENT REQUEST FUTURE SCHEDULE AMT REMAINS NON-ZERO
27917735	27877520	MATCH EVENT ISSUE FOR OFFSET REQUEST
27916798	27558609	FW PORT - BUG 27558609 - RULES BASED AUTOPAY - ISSUE USING ACCOUNT OVERRIDE CALC
27831368	27112905	UNEXPECTED OFFSET REQUEST RESULTS FOR INVOICES WITH CORRECTION LINES

Bug Number	Copy of (Base Bug)	Description
27822557	27960766	REQUEST TO UPDATE THE TO DO MESSAGE FOR REFUND / WRITE OFF APPROVALS
27802665	27421083	RECALCULATE AUTOMATIC PAYMENT AMOUNT(APAYCRET) NOT WORKING FOR SPLIT %
27771820	27697411	AUTO PAY ID NOT STAMPED ON BX FINANCIAL TRANSACTIONS OF A BILL WITH BS AND BX
27770763	27681642	UNIQUE CONSTRAINT VIOLATION BY CIPZKEYG ON ACCOUNT OR SA DTO NEWENTITY CALL
27768628	27618644	MAKE DIVISION PARAMETER OPTIONAL FOR BILLING BATCHES C1-PNDBL, C1-BLGEN, C1-BLPP
27979014	27832708	BILL ROUTING BASE PAGE ERROR
27978690	27916010	ACCRUAL APPROVAL FAILS IF ACCRUAL DETAIL RECORDS HAVE 0 AMOUNT
27978671	27867830	FIX FOR THE DATA PASSING ACROSS THE SPOTS - ACCRUAL REVERSAL ALGORITHM SPOT
27953943	27846800	PERFORMANCE ISSUE IN RMB BASE UI EFFECTIVE PRICING SCREEN.
27924330	27517310	NO DEFAULTING OF BILL ROUTE TYPE, FORMAT, COPIES ON ADDING A NEW BILL ROUTING TY
27916772	27854925	AFTER APPLY PATCH 27009937 CUSTOMER STILL GETTING PRICE PARAM GROUP ID 0 ISSUE
27800413	27109507	C1-PNDBL ADDS REGULAR BILL (WITHOUT TRIAL BILL RUN) WHEN BILL CYCLE IS NOT OPEN
27763751	27141998	SETTLEMENTCONSTRUCT-BILLSEGMENT-USAGEACCOUNTSEARCHFUNCTIONALITY.
27801477	27290631	ENHANCEMENT REQUEST TO ADD AN INDEX ON C1_FT_EXT AND CI_PAY_ST TABLE
27872713	27301476	C1-BLGEN SLOW PERFORMANCE
27798827	27301476	COUNT OF THE BILL SEGMENTS PROCESSED WAS GETTING UPDATED AT THE END.
27865376	27303866	ENHANCEMENT (PRODUCTIZE) REQUEST FOR PERSON INFORMATION STRING IN HOLD REQUEST U
27859343	27381297	ADDRESS ID POPULATED INCONSISTENTLY FOR ELECTRONIC BILL ROUTE TYPE.
27808682	27420785	CURRENCY CONVERSION OF BILL SEGMENT AMOUNT RESULTED IN ROUNDING DIFFERENCE

Bug Number	Copy of (Base Bug)	Description
27800283	27508509	"A BILLABLE CHARGE CONTRACT MAY NOT BE CLOSED." OCCURS WHEN CLOSING A CONTRACT
27800731	27512336	CONTROL CENTRAL UI DOES NOT SHOW PARENT LINK IF RELATIONSHIP HAS ENDDATE
27806798	27517406	RULE UI - BUSINESS LABELS FOR UDF FIELDS NOT DISPLAYED ON RULE UI
27801304	27676540	SAACT UPDATES CI_ACCT.BILL_CYC_CD TO INCORRECT BILL CYCLE
27794511	27731065	HEADER VALIDATION BATCH ALLOW 'ZERO' AS TXN HEADER VOLUME
27808163	27764668	MISSING CONFIGURATIONS IN CI_SCR CONNECTED TO CI_NAV_OPT
27681686	27780270	TRAIL BILL SCREEN- BILL SEGMENT CURRENCY AND SQL ERROR ON CLICKING NEXT ISSUES

Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 2.7.0.0.0 along with workarounds available to handle these issues. The known issues are grouped into the following categories:

- Banking
- Insurance
- Documentation

Banking

Issue	SEARCH RESULT FOR EXCHANGE RATE NOT DISPLAYED CORRECTLY
Description	Searching for the lowest precision rate (0.000000000000000001/0.000000000000000011/0.000000000000000023) from the Search Exchange Rate zone results in displaying the rate in exponential format "IE -18".
Workaround	None

Issue	VALIDATION RULES FOR ADHOC CHARACTERISTIC TYPES ARE NOT TRIGGERED IN THE MANAGE PRODUCTS, MANAGE PRICE LISTS, ADD PRODUCT PRICING, OVERRIDE PRODUCT PRICING, AND EDIT ASSIGNED PRICING SCREENS
Description	When you associate adhoc characteristic types with a product, price list, and a price assignment, validations defined for adhoc characteristic types are not triggered in the Manage Products, Manage Price Lists, Add Product Pricing, Override Product Pricing, and the Edit Assigned Pricing screens.
Workaround	None

Issue	UNABLE TO CHANGE THE DIVISION STATUS FROM ACTIVE TO RETIRED
Description	When the approval workflow functionality is enabled, the status of a division will not get changed from Active to Retired .
Workaround	None

Issue	LOCALIZATION ISSUE WHEN MAKER AND CHECKER CHOOSE DIFFERENT LANGUAGES
Description	When a maker and checker operate in different languages, a maker cannot see the approved transactions.
Workaround	Maker should login with a language that checker is using to see the approved transactions.

Issue	PRE-VALIDATION ERROR MSG FOR INVOICING GROUP EVEN IF PRE-VALIDATION IS OFF
Description	If you set the Pre-validation flag for both the groups (that is, C1IGADD and C1IGUPD) to N , the validation will still be triggered before the approval workflow request is created.
Workaround	None

Issue	FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS
Description	The screens created using the UI map do not support the Foreign Key Value and File Location Value characteristic types. These screens only support the Adhoc Value and Predefined Value characteristic types.
Workaround	None

Issue	MESSAGE DOES NOT APPEAR ON CLICKING BUTTONS IN LIST OF PRICE ASSIGNMENTS ZONE
Description	On approving, rejecting, or canceling one or more price assignment requests (at once) from the List of Price Assignments zone, the appropriate message does not appear when you click the Accept Changes , Return to Submitter , or the Revert to Original button.
Workaround	None

Issue	VIEW RULE TYPE SCREEN - PERFORMANCE ISSUE
Description	If you define a transaction record type with the maximum accounts to be charged set to 5, maximum products to be mapped set to 10, and the maximum product parameters set to 15 and view the details of the rule type, you might experience delay in loading the View Rule Type screen.
Workaround	None

Issue	C1-TXCNC BATCH GETS EXECUTED SUCCESSFULLY EVEN IF C1-TXNCU BATCH FAILS
Description	<p>When you execute the C1-TXNCU batch with either of the following parameters during the cancellation process, an error occurs:</p> <ul style="list-style-type: none"> • Transaction Source • Division <p>If you further execute the C1-TXCNC batch during the cancellation process, the status of all transactions in the feed is changed to Cancelled (CNCL). But, in this case, the SQIs on the billable charges are not accurate.</p>
Workaround	None

Issue	ERRONEOUS RESULTS WHEN BILLABLE CHARGES ARE VOLUMINOUS & SESSION TIMEOUT IS LOW
Description	While billing, you may notice erroneous results when the default session timeout is low and the number of billable charges of an account are high.
Workaround	In such case, we recommend you to generate the bill through a batch process instead of generating the bill through the Bill screen.

Issue	CONDITIONAL APPROVAL WORKFLOW CANNOT BE USED WHILE COPYING A PRICE LIST
Description	The system allows you to define conditional approval workflow for business objects. However, at present the conditional approval workflow cannot be used while copying a price list.
Workaround	None

Issue	BILLS GENERATED FOR THE MEMBER ACCOUNT AND NOT FOR THE MASTER ACCOUNT
Description	If you add a contract to a member account after the account is added to the master account, the system will not duplicate the newly added contract at the master level. Therefore, in such scenarios, billable charges related to the newly added contract will be billed to the member account and not to the master account.
Workaround	You need to ensure that no new contracts are added to the member account after the account is added to the master account.

Issue	INCORRECT RESULTS IF DISAGGREGATION BATCHES NOT EXECUTED IN SEQUENCE
Description	<p>During the transaction disaggregation process, you must execute the following batches in the specified order:</p> <ol style="list-style-type: none"> 1. Identify Affected Transactions (C1-IAENT) 2. Process Non Aggregated Transactions (C1-PDTEXN) 3. Clean Up (C1-TXNCU) 4. Update Disaggregation Request Status (C1-DARSU) <p>Otherwise, erroneous results might occur.</p>
Workaround	None

Issue	PERFORMANCE ISSUE WHILE EXECUTING THE C1-DARSU BATCH WHEN REQUEST_TYPE_FLG=PERS
Description	The system takes long time to change the disaggregation request status when the disaggregation request is created for a person.
Workaround	None

Issue	AGGREGATION DOESN'T WORK IF DISAGG, ROLLBACK, & CANCELLATION EXECUTED IN BETWEEN
Description	If you execute the disaggregation, cancellation, and rollback process in between the aggregation process, the system will not allow you start the aggregation process once again.
Workaround	None

Issue	POST PROCESSING SEGMENT NOT GENERATED IF THE PP MAX VALUE IS SET TO ZERO (0)
Description	If the maximum value is set to zero (0) while defining pricing for a product have price assignment type as post processing, the system does not generate the post processing segments for such products.
Workaround	None

Issue	TWO CONCURRENT RUNS WHICH DERIVE SAME DIVISION FOR TRANSACTIONS DOES NOT WORK
Description	If you execute a batch concurrently with two different divisions (for example, D1 and D2), the erroneous results might occur when transactions in both the runs derive the same division, account, and/or product combination.
Workaround	None

Issue	ERROR OCCURS WHEN YOU DISPLAY BILL FOR A PRODUCT THAT BELONGS TWO RELATIONSHIPS
Description	If a product is added to two or more product to product relationships using the relationship type as Service, the system error occurs when you display bill for the product using Documaker. For example, if P3 is added in the P1 and P2 product relationship using the relationship type as Service, an error occurs when you display bill for P3 using Documaker.
Workaround	None

Issue	ERROR OCCURS IN CASE OF AN IGA SCENARIO WHILE EXECUTING THE C1-PNDBL BATCH
Description	There might be situations when you add an account to an invoicing group after a bill is generated for the account using the new billing batches (i.e. C1-PNDBL, C1-BSGEN, and C1-BLPPR). In such scenario, an error occurs when you execute the C1-PNDBL batch once again to bill charges of the member account on the master account. Similarly, an error occurs when you generate the bill for the account which was earlier billed through the master account using these billing batches.
Workaround	None

Issue	ACTIVE CONSTRUCTS DETERMINED ON CUT-OFF DATE INSTEAD OF CHARGES START & END DATE
Description	The system determines the active construct based on the cut-off date and bills the usage accounts' charges through an invoice account which is defined in the active construct. It does not determine the active construct based on the billable charge's start and end dates.
Workaround	None

Issue	BILL SEGMENTS CREATED BUT FTS NOT CREATED WHEN ACCOUNTING CALENDAR NOT DEFINED
Description	There might be situations when you generate bill segments for a pending bill which is created for a bill cycle whose accounting date either falls within the closed accounting calendar or does not fall within any accounting calendar. In such scenarios, the bill segments are generated, but the financial transactions are not created for the bill segments. An error occurs when you view such bills, whose financial transactions are not created, through the Bill screen.
Workaround	None

Issue	STATUS OF ALL LEGS CHANGED TO ERROR IF EXCHANGE RATE NOT AVAILABLE FOR ONE LEG
Description	If a transaction has multiple legs and the system could not find exchange rate for one of the leg while executing the C1-TXNSQ batch, the status of the transaction and all its transaction legs is changed to Error .
Workaround	None

Issue	INCORRECT RESULTS APPEAR WHEN UNDERSCORE CHARACTER IS USED IN SEARCH CRITERIA
Description	If you use the underscore (_) character in the search criteria, the system does not search strings with the underscore character. Instead, the system interprets the underscore (_) character as a wildcard character.
Workaround	None

Issue	MULTIPLE ISSUES ON SCREENS AND ZONES WHERE PAGINATION IS USED
Description	There are various issues on the screens and zones where pagination is used. For example, the buttons and icons do not appear in the F1-DE-MULQRY zones, paging keys are trimmed, and so on.
Workaround	<p>To resolve these pagination related issues, you need to apply framework single fixes which are available for the following bugs:</p> <ul style="list-style-type: none"> • 20302717 - PAGINATION PANEL SHOWING INCORRECT VALUE FOR TOTAL PAGES AND CUSTOM ICONS DO NOT • 20261532 - PAGINATION PANEL IS BEING DISPLAYED ON ORASEARCH OPERATION • 20113520 - BUTTON AND ICON DOESN'T APPEAR FOR PAGINATION IN F1-DE-MULQRY ZONES • 19941127 - PAGINATION FEATURE NOT WORKING FOR SUBQUERIES USED IN ZONE SQL • 19163528 - PAGINATION : PAGING KEY GETS TRIMMED AND RETURNS NO RESULTS • 18965501 - PAGINATION : ALL THE PAGES DISPLAY SAME SET RECORDS WHEN EQUAL OPERATOR IS USED • 18953690 - PAGINATION: ROW SERIAL NUMBERS RESET WHEN WE SORT COLUMN, AFTER "NEXT" CLICK • 18887503 - PAGINATION DOCUMENTATION NEEDS MORE DETAIL • 18639253 - PAGINATION - MISSING ICON, PAGE LABEL AND PAGE SIZE • 18491431 - DATA EXPLORER PAGINATION IS NOT CONSIDERING THE SQL COUNT LIMIT ZONE PARAMETER • 18399979 - PAGINATION - CRASHING IF PAGING COLUMN IS NOT DISPLAYED • 18399934 - PAGINATION - NOT WORKING FOR DESCENDING SORT • 20864137 - PAGINATION DOES NOT WORK PROPERLY WHEN PORTAL HAS MULTIPLE BROADCAST ZONES

Issue	PAYMENT AMOUNT IS INCORRECT WHEN PAYMENTS HAVE FROZEN & OVERPAYMENT PAY SEGMENTS
Description	If the payments have both frozen and overpayment pay segments, the payment amount displayed corresponding to the overpayment and frozen payment in the Payments zone of the Remittance Summary screen is incorrect. The system displays the total payment amount instead of displaying the overpayment and frozen pay segment amount.
Workaround	None

Issue	ERROR OCCURS WHEN BIND VARIABLES USED IN IN AND NOT IN CLAUSES WITHOUT BRACKETS
Description	If a template is used in a construct for selecting usage accounts, billable charges, or adjustments where bind variables are used in the IN and NOT IN clauses without brackets, an error occurs when you bill an account through such construct.
Workaround	We recommend you to use bind variables within brackets in the IN and NOT IN clauses while defining a template.

Issue	C1-ADUP1 BATCH DOES NOT SUPPORT MULTI-CURRENCY ACCOUNTS FEATURE
Description	An error occurs while executing the C1-ADUP1 batch when the adjustment currency is different from the account's invoice currency. This is because, at present, the C1-ADUP1 batch does not support the Multi-Currency Accounts feature.
Workaround	None

Issue	ABLE TO CREATE BILLABLE CHARGES FOR AN INVOICE ACCOUNT
Description	Ideally, the system should not allow you to create billable charges for an invoice account. At present, there is no restriction, and therefore you can create billable charges for an invoice account which are billed through the invoice account.
Workaround	None

Issue	PARTIAL DATA UPLOADED WHEN USAGE RECORD HAS MORE THAN FIVE PASS THROUGH CHARGES
Description	If you upload a usage record which has more than five pass through charges (for example, Bill Line 1, Bill Line 2, ..., Bill Line 8), at present, the system uploads the details of only five pass through charges (i.e. till Bill Line 5). The details of Bill Line 6, Bill Line 7, ..., and Bill Line 8 are not uploaded.
Workaround	None

Issue	LENGTH OF UDF_CHAR_X IS 50 IN THE TFM ODI PACKAGE AND 60 IN THE DATABASE
Description	In the ORMB database, the maximum size of the UDF_CHAR_1, UDF_CHAR_2, ..., UDF_CHAR_50 columns is set to 60 characters. However, while uploading the transaction data via ODI, you can specify maximum 50 and not 60 characters in the CSV file.
Workaround	None

Issue	ADJUSTMENT CREATED WHEN CONTRACT ID IS VALID, BUT ACCOUNT IDENTIFIER IS INVALID
Description	If you upload an adjustment data file with a record where the contract ID is valid, but the account ID or account identifier is invalid, the system creates the adjustment against the contract. Ideally, the system should not create the adjustment until and unless the contract ID, account ID, account identifier type, and account identifier are valid.
Workaround	None

Issue	ABLE TO GENERATE A BILL FOR A SETTLEMENT ACCOUNT FROM THE BILL SCREEN
Description	Ideally, the system should not allow you to generate a bill for a settlement account. However, at present, you can generate a bill for a settlement account from the Bill screen.
Workaround	None

Issue	ADJUSTMENT CREATED AGAINST PREVIOUS BILL IS NOT CONSIDERED DURING TRIAL BILLING
Description	If you create an adjustment against the previous completed bill, the adjustment is not presented on the next bill during trial billing. This open item accounting feature is not supported during trial billing.
Workaround	None

Issue	REOPEN BUTTON DISABLED WHEN C1-BILLSETT ALGORITHM ATTACHED ON CUSTOMER CLASS
Description	If you attach an algorithm of the C1-BILLSETT algorithm type on the Bill Completion system event of the account's customer class, at present, you will not be able to reopen a bill.
Workaround	None

Issue	THE PAYMENT REQUEST SCREEN DOES NOT SUPPORT MULTIPLE TENDERS
Description	At present, the system does not support multiple tenders when you create a payment from the Payment Request screen.
Workaround	None

Issue	UNABLE TO SAVE MULTIPLE CHARACTERISTICS FOR A PRICE ASSIGNMENT
Description	While defining characteristics for a price assignment, you can specify multiple characteristics in the screen, but only one characteristic is saved in the application.
Workaround	None

Issue	UNABLE TO SCROLL LEFT TO VIEW TABS ON THE LEFT IN THE DIVISION SCREEN
Description	The Scroll Left icon is not available in the Division screen. Therefore, you will not be able to scroll left if you are on the extreme right tab in the screen.
Workaround	None

Issue	POP-UP WINDOW NOT DISPLAYED PROPERLY WHEN YOU MOUSE OVER DETAILED DESCRIPTION
Description	In the Batch Control screen, a pop-up window appears when you move the mouse over the Detailed Description field. At present, the data is not properly displayed in the pop-up window.
Workaround	None

Issue	QUERY ZONE - HORIZONTAL SCROLL BAR SCROLLS THE SEARCH CRITERIA FIELDS
Description	The Query zone allows you to search for an object. At present, whenever you search in the Query zone and use the Horizontal Scroll Bar, the search criteria fields are also scrolled to the left along with the search results.
Workaround	None

Issue	PERFORMANCE ISSUE ON CHANGING THE SEARCH BY FILTER OPTION
Description	If you change the filter option from the Search By list, the system takes long time to load the respective query zone. You may observe this issue in many screens where the multi-query zone is used.
Workaround	None

Issue	EFFECTIVE PRICING NOT VISIBLE IF C1_PER_REL HAS INVALID PERSON RELATIONSHIP TYPE
Description	If you set the Check on Feature Configuration parameter in an algorithm which is created using the C1-CUSRLALGT algorithm type to A and add an invalid person relationship type in the C1_PER_REL feature configuration, the effective pricing is not inherited properly as expected.
Workaround	None

Issue	GRANDFATHERING NOT WORKING IN CASE OF GLOBAL AND DEFAULT PRICE LIST
Description	When you define a product pricing in a global or default price list which is applicable only to the new customers, the product pricing is not used during the billing process. Instead, the incorrect product pricing is picked up during the billing process.
Workaround	None

Issue	RECORDS IN THE ADJUSTMENT DATA FILE NOT UPLOADED IN THE SPECIFIED SEQUENCE
Description	When you upload the records of an adjustment data file, the records are not uploaded in the sequence in which they are listed in the CSV file.
Workaround	None

Issue	PAYMENT/TENDER SEARCH- COLUMN HEADERS INCORRECT WHEN SEARCH FILTER IS CHANGED
Description	If you search using a particular filter option in the Payment/Tender Search screen, the search results are displayed accordingly. Then, if you change the search filter and criteria, the search results are displayed accordingly, but the column headers are not updated.
Workaround	None

Issue	ERROR LOG FILES GENERATED ON EXECUTING BILLING AND C1-BLPPR BATCHES
Description	In ORMB 2.7.0.0.0, the error log file is generated even when the following batches are executed successfully and bills are completed: <ul style="list-style-type: none"> • BILLING • C1-BLPPR
Workaround	None

Issue	FIELD ALIGNMENT ISSUE ON BUSINESS OBJECT BASED GENERATED UI MAPS
Description	You may observe that the algorithm description is not properly aligned corresponding to the Algorithm field in the following screens: <ul style="list-style-type: none"> • Upload Request Type • Upload Adjustment Data File
Workaround	None

Issue	MANUAL DISTRIBUTION NOT WORKING IN THE PAYMENT SCREEN
Description	On saving, the distributed amount is reset to zero when you manually distribute the tender amount among the unpaid bills in the Payment screen.
Workaround	None

Issue	ERROR OCCURS ON EXECUTING BILLOPEN IF IN CLAUSE CONTAINS MULTIPLE BIND VARIABLES
Description	If you have used template in a construct where IN clause has multiple bind variables, an error occurs while executing the Construct Based - Pending Bill Generation (BILLOPEN) batch.
Workaround	None

Issue	ELIGIBILITY CRITERIA ROW IS SKIPPED IF LEFT HAND SIDE PARAMETER IS NOT SPECIFIED
Description	If the left hand side parameter is not specified in an eligibility criteria row while defining or editing a price item pricing, the eligibility criteria row is skipped and not saved in the system.
Workaround	None

Issue	POST-PROCESSING BILL SEGMENT NOT REGENERATED WHEN YOU CLICK THE GENERATE BUTTON
Description	An error occurs when you click the Generate button in the Bill Segment screen while regenerating the post-processing bill segment which is present on the pending bill.
Workaround	None

Issue	WRONG CURRENCY CONVERSION ALGORITHM IS USED WHILE EXECUTING THE C1-REPC2 BATCH
Description	While executing the C1-REPC2 batch, the system should use the currency conversion algorithm attached to the Currency Conversion For Bill Segments algorithm spot of the division. Instead, the system uses the currency conversion algorithm attached to the Currency Conversion For Adjustments algorithm spot of the division.
Workaround	None

Issue	RATE CALCULATED INCORRECTLY WHEN EXCHANGE RATE IS CHANGED DURING PRICING PERIOD
Description	At present, the rate is calculated and persisted using the exchange rate which is effective on the price item pricing effective start date. Therefore, the persisted rate shown on the Pricing (Account) screen might be incorrect when the exchange rate is different on the date when the results are fetched on the Pricing (Account) screen.
Workaround	None

Issue	ENTRY NOT CREATED IN THE CI_REPRC_ENTITY_DTL TABLE ON EDITING A PRICE LIST
Description	If you edit the details of a price list which is assigned to an account or a person, an entry is not created in the CI_REPRC_ENTITY_DTL table. In other words, the repricing is not triggered on editing the details of a price list which is already assigned to an account or a person.
Workaround	None

Issue	UNABLE TO DEFINE PARAMETER FOR FIELDS WHICH BELONG TO CHILD TABLES
Description	At present, the system does not list the fields of child tables in the Source Type Code field when you select the source entity as Account, Person, or Product while defining a parameter. Therefore, you cannot define a parameter for child table' fields and as a result, repricing is not triggered when you change the value of any child table' field. For example, when you change the main customer of an account, repricing is not triggered because the MAIN_CUST_SW field belongs to the child table named CI_ACCT_PER table for which you cannot define a parameter in the system.
Workaround	None

Issue	RATE NOT PERSISTED ON PRICE ASSIGNMENT DATE WHEN C1-PRICEACCOUNT INVOKED MANUALLY
Description	When you manually execute the C1-PriceAccount business service for an account, rate is calculated and persisted for the price item pricing available on the default and global price list on the date when the C1-PriceAccount business service is invoked. Ideally, the rate must be calculated and persisted on the price item pricing effective start date.
Workaround	None

Issue	PERSISTED DATA NOT GETTING REFRESHED ON EDITING PRICE ASSIGNMENT
Description	On editing a price item pricing, the rate is not properly recalculated and persisted when the details of a price component, such as rate, eligibility criteria, and so on are changed.
Workaround	None

Issue	CALENDAR (START DATE AND END DATE) POP-UP NOT ALIGNED PROPERLY
Description	Calendar pop-up for start date and end date of Hold Request screen is displayed partially outside the screen.
Workaround	None

Issue	PRICELIST EDIT VALIDATIONS NOT DEPENDENT ON ASSIGNMENT DATE OR ASSIGNMENT STATUS
Description	Available and Eligible dates can be edited in Price List though Assignment Date or Assignment Status is added for price list.
Workaround	None

Issue	STACKING IS NOT SUPPORTED FOR PRICE SIMULATION
Description	Stacking is supported for bill generated through an Account. Pricing Simulation does not support stacking.
Workaround	None

Issue	ADJUSTMENT AMOUNT IS NOT PICKED UP FOR PAYMENT IN NEXT BILL
Description	When you generate an Adjustment after a successful payment, the Adjustment amount is not picked up in the next bill that is generated and hence, payment is not created for the adjustment amount.
Workaround	None.

Issue	IF USAGE ACCOUNT IS NOT PART OF ANY INVOICE CONSTRUCT, BILL IS NOT GENERATED.
Description	At present system does not allow user to generate a bill on usage account which is not part of any invoice construct. System should allow user to generate a bill on usage account which is not part of any invoice construct.
Workaround	None

Issue	SPLIT AUTO PAY NOT AVAILABLE ON SETTLEMENT CONSTRUCT ACCOUNT CREATION SCREEN.
Description	At present split auto pay is not supported on Settlement construct because Percentage field has to be added in Auto Pay Instructions section while creating a new account.
Workaround	None

Issue	SQL ERROR ON PRICE ASSIGNMENT SCREEN WITH ADHOC VALUE PASSED IN QUOTES.
Description	At present SQL error is displayed in Price Assignment screen for parameter when adhoc value is added in quotes. Price Assignment should be successful though value added is in single quotes.
Workaround	None

Issue	BS ARE NOT GETTING PICKED FOR BATCH DATE AFTER BILLABLE CHARGE END DATE
Description	At present, batch business date is later then billable charge date and C1_BILLGEN is not creating any BS, hence bill is not generated.
Workaround	None

Issue	RSDETAILS UPDATED INCORRECTLY WHEN PRICE COMPONENT FEES/RATE) PERSISTENCE EDITED
Description	At present RSDetails after modification is displayed and not the details before editing.
Workaround	None

Issue	FEES RATE CALCULATION PRE-PROCESSING ALGORITHM ISSUE
Description	Algorithm only considers the latest Service Quantity Identifier, it has to consider both Parameter and Service Quantity Identifier when calculating FEES and RATE.
Workaround	None

Issue	C1-ACFEES BATCH RUN WITH PRICE ITEM CODE AS THE ONLY PARAMETER.
Description	C1-ACFEES batch should consider records of price assignment where FEES for same should persist.
Workaround	None

Issue	PRICE ASSIGNMENT TYPE - POST PROCESSING ISSUE IN FEES CALCULATION BATCH.
Description	New value to be added in Price Assignment Type for post processing issue in FEES calculation batch.
Workaround	None

Issue	C1-ACCOUNTFEES SERVICE ISSUE
Description	At present FEES for price assignments are not persisted if any one price assignment eligibility rule results false and if no RATE found for same.
Workaround	None

Issue	PAYMENT STATUS REMAINS INCOMPLETE AND NO PAYMENT SEGMENT IS GENERATED EVEN WHEN TENDER CONTROL ID IS GENERATED
Description	For `On Extract Date`, if one of the split auto payments goes in to error state, BALAPY batch generates Tender Control Id and Payment Status remains Incomplete and no Payment segment is generated.
Workaround	None

Issue	CHANGES MADE TO ACCOUNT ARE NOT UPDATED WHEN APPROVAL WORKFLOW IS ACTIVE FOR ACC
Description	At present columns are not properly aligned and changes are not updated when Approval Workflow is Active. Changes done to account should be updated when approval workflow is active.
Workaround	None

Issue	INBOUND WEB SERVICE DOES NOT TRIM LEADING & TRAILING SPACES FROM INPUT PARAMETER
Description	If you pass input parameters with leading and trailing spaces to an inbound web service, the inbound web service does not trim the leading and trailing spaces from the input parameters.
Workaround	None

Issue	IF USER ADDED DEFER AUTO PAY DATE ON ACCOUNT THEN AUTO PAY WILL NOT WORK
Description	If you manually add the date in the Defer Auto Pay Date field, the automatic payment functionality will not work for the account.
Workaround	None

Issue	TOTAL OVERDUE AMOUNT IN ACCOUNT & PERSON DETAILS SECTIONS SHOW INCORRECT VALUE
Description	If you manually include a bill in more than one active overdue process through the user interface, the amount shown in the Total Overdue Amount field is incorrect when you search for an overdue process using the Person or Account details in the Delinquency Central screen.
Workaround	None

Issue	SEASONAL ADDRESS ID DOES NOT APPEAR IN THE BILL ROUTINGS TAB OF THE BILL SCREEN
Description	At present, the seasonal address which is effective at the time of billing is considered for bill routing. You can view the seasonal address details in the Bill Routings tab of the Bill screen. However, the seasonal address ID does not appear corresponding to the Address ID field.
Workaround	None

Issue	ACCOUNT OVERRIDE ADDRESS IS NOT DELETED WHEN THE BILL ROUTING RECORD IS DELETED
Description	Once you delete a bill routing record for a person from the Account screen where the Address Source field is set to Account Override , the corresponding account override address is not deleted from the system. You can still view the account override address on the screen.
Workaround	None

Issue	OVERRIDE DUE DATE NOT CALCULATED CORRECTLY IN CASE OF REINSTATEMENT
Description	If a customer is not active (i.e. does not have at least one active policy) and reinstatement request is received to reinstate the customer's policy which is terminated due to non-payment, the system should override the due date on the next bill using the Days Until Due parameter in the C1-DUEDTFTCV algorithm which is attached on the respective customer class. As per this algorithm, the override due date should be calculated as bill date plus days until due. However, at present, the system does not override the due date using the Days Until Due parameter. It reflects the due date which is the next coverage period start date.
Workaround	None

Issue	C1-FTDRD BATCH THROWS NULL POINTER EXCEPTION
Description	A null pointer exception occurs when you specify the trace parameters while executing the Financial Transaction Distribution Monitor (C1-FTDRD) batch.
Workaround	None

Issue	ERROR OCCURS ON USING A VALUE WITH HYPEN FOR A CHARACTERISTIC TYPE
Description	At present, an error occurs on a screen where a characteristic value with hypen (-) is defined for a characteristic type.
Workaround	None

Issue	AN ERROR OCCURS ON THE TEMPLATE SEARCH WINDOW
Description	If you do not specify at least one account selection template while defining a construct, an error occurs indicating that at least one account selection template must be specified. Now, when you search for an account selection template using the Search icon corresponding to the respective field, the Template Search window appears with the same error (indicating that at least one account selection template must be specified). The system should not display any error in the Template Search window.
Workaround	None

Issue	DISPUTE AMT AT BILL LEVEL INCORRECT WHEN BILL SEGMENT OF PREVIOUS BILL CANCELED
Description	If a bill segment of the previous bill is canceled and you create a dispute request against an account for the corresponding next bill, the dispute amount displayed against the bill in the Dispute Details zone is incorrect.
Workaround	None

Issue	SAVE BUTTON IS ENABLED WHEN A BILL IS IN THE COMPLETE OR CANCELED STATUS
Description	The Save button in the Page Title area on the Bill screen should be disabled when a bill is in the Complete or Canceled status. However, at present, the Save button is enabled when a bill is in the Complete or Canceled status.
Workaround	None

Issue	APAYCRET BATCH DOES NOT CONSIDER ECR ADJUSTMENTS CREATED ON PENDING BILL
Description	You can only use an adjustment type where the Print by Default and Impact Next Bill Balance check boxes are not selected to create transfer adjustment while distributing earnings credit rate. Therefore, an ECR adjustment created against a pending bill is not stamped on the bill. As a result, the Automatic Payment Creation (APAYCRET) batch creates automatic payment for the bill without considering the ECR adjustment.
Workaround	None

Issue	PERCENTAGE (%) WILDCARD NOT ALLOWED IN PERSON NAME WHILE SEARCHING FOR AN ENTITY
Description	The system does not allow you to specify the Percentage (%) wildcard in the Person Name field while searching for any entity across application. At present, the system automatically appends the criteria in the Person Name field with the Percentage (%) wildcard and accordingly searches for the entity.
Workaround	None

Issue	SINGLE MATCH EVENT CREATED WHEN MULTIPLE BILL SEGMENTS OF A CONTRACT ARE NETTED
Description	At present, the system creates single match event for all bill segments of a contract which are netted. For example, there are two bill segments – BS1 (50\$) and BS2 (-50\$) of the C1 contract on a bill. In this case, the system nets the BS1 and BS2 because it results in zero contract balance, and then creates single match event for BS1 and BS2.
Workaround	None

Issue	RECOGNITION SCHEDULE NOT GENERATED FOR BX/AX WHEN DRR FOR BS/AD DOES NOT EXIST
Description	There might be situations when you have attached the C1-REVRECSCH algorithm to a contract's contract type for which bill segments and adjustments are already generated. Now, if already generated bill segments or adjustments are canceled, the system will generate the deferred revenue recognition for BX and AX even if the deferred revenue recognition does not exist for the corresponding BS and AD. But, the recognition schedule is not generated. You cannot even edit the recognition schedule of a deferred revenue recognition which is created for BX and AX.
Workaround	None

Issue	AUTO PAY ID IS NOT UPDATED WHEN A REOPENED BILL IS COMPLETED
Description	When you reopen and complete a bill, the bill's due date is recalculated. On completing a reopened bill, the system does not check whether there are rule based auto pay instructions for the account which are effective on the latest bill due date. In other words, the system does not update the auto pay ID against the financial transactions in the C1_FT_EXT table. In addition, the entries in the CI_BILL_ACH table are not updated.
Workaround	None

Insurance

Issue	OLD INSURANCE FEATURES ARE NOT TESTED AND VERIFIED IN ORMB VERSION 2.7.0.0.0
Description	In this release, the new policy data model is introduced. The old policy data model which is accessible to the INADMIN user group is no longer operational. The old insurance features, such as Insurance Control Central, Deferred Revenue Recognition, Account Current, Pay Plan, Group Billing, and List Bill Reconciliation are not tested and verified with the new policy data model.
Workaround	None

Issue	PERFORMANCE ISSUE WHILE CREATING DEFERRED REVENUE RECOGNITION SCHEDULE
Description	If there are large number of bill segments and adjustments for which deferred revenue recognition schedule must be generated, the system takes long time to generate deferred revenue recognition schedules.
Workaround	None

Issue	VALIDATION FOR FIDUCIARY CONTRACT MISSING DURING RECONCILIATION
Description	While changing the status of the reconciliation object to Ready To Pay, the system does not validate whether fiduciary contract exists for the group account.
Workaround	You need to ensure that group customer has fiduciary contract associated with the account through which payments can be made for the list bills.

Issue	TWO BILL SEGMENTS GENERATED WHEN REASON CODE EFFECTIVE DATE IS SAME AS BILL SEGMENT START DATE
Description	When you select the Update option from the Reason Code list and specify the reason code effective date same as the bill segment start date, the system creates two bill segments – one with prorated billed amount and another with prorated reported amount. Ideally, the system should only create one bill segment with prorated reported amount.
Workaround	None

Issue	UNABLE TO DISTRIBUTE THE REMAINING PAYMENT MANUALLY
Description	If you have distributed partial payment automatically through the Payment by Transaction screen, the system does not allow you to distribute the remaining payment manually.
Workaround	None

Issue	FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS
Description	The screens created using the UI map do not support the Foreign Key Value and File Location Value characteristic types. These screens only support the Adhoc Value and Predefined Value characteristic types.
Workaround	None

Issue	CHARACTERISTIC TYPES ARE NOT FILTERED BASED ON THE REASON CODE
Description	While editing the reconciliation object line, the characteristic types are not filtered based on the reason code that you have selected. Currently, it lists all characteristic types where the characteristic entity is set to Reason Code .
Workaround	None

Issue	RECONCILIATION DOESN'T WORK PROPERLY FOR PASS THROUGH BILLABLE CHARGES
Description	In the sample case workflow, the system checks whether the difference between the reported and billed amounts is within the tolerance limit. If so, the system must change the status of the reconciliation object line to WD-Match . However, at present, in case of pass through billable charges, the system changes the status of the reconciliation object line to Manual instead of WD-Match .
Workaround	None

Issue	ERROR OCCURS WHEN YOU RESOLVE A RECONCILIATION OBJECT LINE FROM THE CASE SCREEN
Description	The system allows you to manually resolve a reconciliation object line from the Case screen and change the status of the reconciliation object line to Manual Match . At present, an error occurs when you click the Manual Match button in the Case screen.
Workaround	None

Issue	OVERRIDE DESCRIPTION APPEARS INSTEAD OF DESCRIPTION IN THE SOURCE SYSTEM LIST
Description	At present, the override description of the source system appears in the Source System list instead of the description when you select the Policy option from the Search By list in the Customer 360-Degree View screen.
Workaround	None

Documentation

Issue	"ERROR 500--INTERNAL SERVER ERROR" - ONLINE HELP IS NOT WORKING
Description	<p>At present, an error occurs when you access online help for the following screens:</p> <ul style="list-style-type: none"> • Account Collection Summary • Account Current • COBOL Program • Collection Control Central • Contract Type - Charge Type Mapping • Contract Type - Pay Plan Template Mapping • External Statement • FK Validation Summary • Pay Plan Template • Policy (P&C) • Reason Code • Reconciliation Object • Reconciliation Object Line Status • Unit of Measure
Workaround	None

Issue	ONLINE HELP NOT AVAILABLE FOR SOME SCREENS OR TABS
Description	<p>At present, the online help is not available for the following screens:</p> <ul style="list-style-type: none"> • Collection Type • Loan • Request <p>In addition, the online help is not available for the following tabs:</p> <ul style="list-style-type: none"> • Rate Schedule – SQ Rule Tab
Workaround	None

Issue	INDEX ENTRIES NOT DEFINED FOR THE BANKING AND INSURANCE MODULES
Description	At present, index entries are not defined for all topics in the Banking and Insurance modules.
Workaround	None

Issue	2.4.0.1.0 BILL TOLERANCE AND CONSTRUCT RELATED CHANGES NOT REFLECTED IN BANKING USER GUIDE
Description	At present, the Bill Tolerance and Construct related changes which were incorporated in 2.4.0.1.0 are not yet reflected in the 2.7.0.0.0 Banking User Guide which is available on OTN.
Workaround	None

Issue	CONTENT ADDED IN STEPRESULT AND INFO TAGS IS DISPLAYED IN BOLD
Description	At present, the content added within the STEPRESULT and INFO tags is displayed in bold in the online help. This behavior is observed in Oracle Help and not in SPLHelp.
Workaround	None

Issue	COMMENTS NOT COPIED IN MAIL WHILE SUBMITTING FEEDBACK TO THE DOCUMENTATION TEAM
Description	The feedback entered in the Comments text box is not copied to the mail while submitting the feedback form in Oracle Help.
Workaround	You will have to manually add the comments in the e-mail before sending the feedback to the documentation team.

Technical Support

For any technical support, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.