

Oracle® Revenue Management and Billing

Version 2.9.0.0.0

Release Notes

Revision 1.6

F23658-01

March, 2020

Oracle Revenue Management and Billing Version 2.9.0.0.0 Release Notes

F23658-01

Document Category: Public

Copyright Notice

Copyright © 2009, 2020 Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle, Java, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

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

License Restrictions Warranty/Consequential Damages Disclaimer

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

Warranty Disclaimer

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

Restricted Rights Notice

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

U.S. GOVERNMENT RIGHTS

Oracle programs, including any operating system, integrated software, any programs installed on the hardware, documentation, and/or technical data delivered to U.S. Government end users are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, documentation, and/or technical data shall be subject to license terms and restrictions as mentioned in Oracle License Agreement, and to the extent applicable, the additional rights set forth in FAR 52.227-19,

Commercial Computer Software--Restricted Rights (June 1987). No other rights are granted to the U.S. Government.

Hazardous Applications Notice

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

Third Party Content, Products, and Services Disclaimer

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

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.
<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.

Document	Description
<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	19-May-2020	Billing	Updated Information
		Deprecation Planned for Future Releases	Updated Information
		Known Issues	Added Information
1.2	06-Jul-2020	Construct Based Billing	Added Information
		User Interface (UI) Level Changes	Added Information
1.3	09-Sep-2020	Formatting Objects Processor (FOP) Based Reporting	Added Section
		Unsupported Integrations	Added Section
		Billing	Added Information
		Approval Workflow	Added Section
		C1-ASOBLLNG Feature Configuration	Added Information
		Construct Based Billing	Added Information
1.4	15-Sep-2020	Billing	Added Information
		Financial Transactions	Added Section
1.5	08-Feb-2021	Deprecation Notices for ORMB Version 2.9.0.0.0	Updated Information
1.6	19-Jan-2022	-	Added Bookmarks in PDF

Contents

Prerequisites	1
New Features (Generic).....	2
Invoice Request.....	2
Account Number Encryption.....	8
Formatting Objects Processor (FOP) Based Reporting	8
New Features (Specific to Financial Services)	10
Price Item Hierarchy.....	10
Deal Modelling and Simulation.....	11
New Features (Specific to Insurance)	17
Off-Process Request.....	17
Accumulation Data.....	20
Terminal Liability Reserve (Run Out) Level Funding	21
Enhancements (Generic)	23
Billing.....	23
Entity Audit	25
View Billed Transactions	25
Person Information	26
Pricing Management.....	26
Approval Workflow	28
Financial Transactions.....	28
Enhancements (Specific to Financial Services).....	29
Construct Based Billing	29
Enhancements (Specific to Insurance).....	30
Customer 360° View.....	30
Policy, Plan, and Membership.....	31
C1-ASOBLLNG Feature Configuration	32
Repricing	34
Inbound Message.....	35
Fully-Insured Pricing Rules	36
Fully-Insured Policy Plan Contract Creation.....	37
Charge Type	37
Self-Funded Pricing	38

Trial Billing.....	40
Entity Audit	40
User Interface (UI) Level Changes	41
Database Level Changes	48
Supported Platforms	49
Oracle Utilities Application Framework 4.4.0.0.0 Enhancements	50
System Wide Enhancements.....	50
New Style Sheets.....	50
Marking a Filter Value in Error	50
To Do Enhancements	51
To Do Pre-creation Algorithm on To Do Type.....	51
To Do Management Portal.....	51
More Granular Security on Current To Do Zone.....	52
External Messages Enhancements.....	53
Support URI Substitution for WSDL Link for SOAP Services.....	53
Support URI Substitution for External Links to the Application.....	53
Miscellaneous Enhancements.....	53
Menu Name Visible in Search Menu Results in Debug Mode	53
Technical Recommendations.....	54
Supported Upgrades	55
Unsupported Integrations	56
Deprecation Notices for ORMB Version 2.9.0.0.0	57
Deprecated Functionality in This Release	57
Deprecation Planned for Future Releases	57
Product Documentation	60
Media Pack Download	61
Bug Fixes	62
Known Issues	65
Banking.....	65
Insurance.....	92
Documentation	95
Technical Support	97

Prerequisites

If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 2.9.0.0.0, 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 2.8.0.0.0 will not happen successfully.
- Transactions which are uploaded using 2.8.0.0.0 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:

- Invoice Request
- Account Number Encryption
- Formatting Objects Processor (FOP) Based Reporting

Invoice Request

Oracle Revenue Management and Billing enables you to generate an adhoc regular or trial bill for an account through an invoice request. The system enables you to create an invoice request manually or automatically. It enables you to create an invoice request for a person or an account. You can create an invoice request for an account where the **Eligible For Invoice Request Creation (INVRACTE)** characteristic is set to **Y**.

If you create an invoice request for a person, the system will consider all those accounts of the person where the **Eligible For Invoice Request Creation (INVRACTE)** characteristic is set to **Y**. You can then exclude an account from the invoice request, if required. The system also enables you to consider all accounts of the person and its child persons where the **Eligible For Invoice Request Creation (INVRACTE)** characteristic is set to **Y**.

Note: The system searches for the characteristic type which is specified in the **Invoice Request Account Eligibility Char Type** option type of the **C1-INVREQ** feature configuration. By default, this option type is set to **INVRACTE**. You can change the characteristic type, if required.

In other words, the system enables you to create the following types of invoice request:

- **Manual Regular Bill Generation Invoice Request** – It is used to generate an adhoc regular bill for an account. You can create a manual regular bill generation invoice request for a person or an account from the user interface.
- **Manual Trial Bill Generation Invoice Request** - It is used to generate an adhoc trial bill for an account. You can create a manual trial bill generation invoice request for a person or an account from the user interface.
- **Automatic Regular Bill Generation Invoice Request** – It is used to generate an adhoc regular bill for an account. You can configure the system such that an automatic regular bill generation invoice request is created for an account automatically when a fully-insured policy is activated, terminated, reinstated, or renewed from the user interface or through a health care inbound message.

Note:

The automatic invoice request creation feature is only designed to work for the fully-insured health care business and not for the financial services or self-funded health care business.

You cannot create an automatic regular bill generation invoice request for a person.

At present, the system is not designed to create an automatic trial bill generation invoice request.

While creating an invoice request, you need to specify an invoice request type using which you want to create the invoice request. The system enables you to create the invoice request types with the following combinations:

Invoice Mode	Bill Generation Type	Approval Process
Manual	Regular	On
Manual	Regular	Off
Manual	Trial	Off
Automatic	Regular	Off

It is the invoice request type which helps the system to determine:

- The business object using which the invoice request should be created in the system

Note: Two invoice request business objects named **Invoice Request - Regular Bill Generation (C1-InvoiceRequest)** and **Invoice Request - Trial Bill Generation (C1-InvoiceRequestTrial)** are introduced in this release. If the **Bill Generation Type** field is set to **Regular**, you must select the **Invoice Request - Regular Bill Generation** business object from the **Invoice Request Business Object** list. However, if the **Bill Generation Type** field is set to **Trial**, you must select the **Invoice Request - Trial Bill Generation** business object from the **Invoice Request Business Object** list.

- Whether a manual or automatic invoice request should be created in the system
- Whether a regular or trial bill generation invoice request should be created in the system
- Whether a manual regular bill generation invoice request for an account should be processed in the online or deferred mode

Note:

The system will process a manual regular bill generation invoice request for an account in the deferred mode when the number of billable charges of the account exceeds the defer processing billable charge count.

The defer processing billable charge count is not considered when a manual regular bill generation invoice request is created for a person.

You can specify the defer processing billable charge count only when the invoice mode is set to **Manual** and bill generation type is set to **Regular**.

- Whether the approval is required for the invoice request

Note: You can only set the **Approval Required** flag when the invoice mode is set to **Manual** and bill generation type is set to **Regular**.

- The wait days which is used to calculate the processing date for an invoice request

Note:

If the invoice request is processed in the online mode, the system will process the invoice request when the processing date is earlier than or equal to the system date. However, if the invoice request is processed in the deferred mode, the system will process the invoice request when the processing date is earlier than or equal to the batch business date.

If required, you can configure the system such that the processing date does not fall on a holiday. To implement this requirement you need to specify the work calendar which helps to determine the working day.

- The date calculation algorithm which is used to calculate the processing date for an automatic regular bill generation invoice request

Note: In addition, you can configure threshold days for automatic invoice request creation. It is used to determine whether the number of days between the bill cycle date and processing date is greater than the threshold days. This parameter is used in Invoice Request Date Calculation algorithm to check whether the processing date of the invoice request is within threshold period. If so, the automatic invoice request is not created for the account. This parameter is only applicable while activating or renewing a fully-insured policy.

While creating a manual invoice request, you need to specify the following – invoice request type, entity (i.e. person or account for which the invoice request should be created), cutoff date, accounting date, and bill date.

Note: The cutoff date, accounting date, and bill date are derived while creating an automatic invoice request for an account.

Manual Regular Bill Generation Invoice Request

Once a manual regular bill generation invoice request is created in the **Draft** status, the system checks whether it is created for a person or an account. If a manual regular bill generation invoice request is created for an account, you can submit the invoice request. On submitting the invoice request, the system checks whether the number of the billable charges of the account exceed the defer processing billable charge count. If the number of the billable charges of the account exceed the defer processing billable charge count, the status of the invoice request is changed to **Defer Processing Batch**. However, if the number of the billable charges of the account does not exceed the defer processing billable charge count, the system checks whether the processing date of the invoice request is earlier than or equal to the system date. If the processing date is later than the system date, the status of the invoice request is changed to **Defer Processing**. On the **C1-INVRQ** batch execution, the system checks whether there are any invoice requests in the **Defer Processing** status. If there is an invoice request in the **Defer Processing** status, the system checks whether the processing date of the invoice request is earlier than or equal to

the system date. If the processing date is later than the system date, the status of the invoice request remains as **Defer Processing**.

Note: The system enables you to cancel an invoice request which is in the **Defer Processing Batch** or **Defer Processing** status.

However, if the processing date is earlier than or equal to the system date, the system checks whether the pending bill already exists for the account. If the pending bill does not exist for the account, the system checks whether the cutoff date is later than the bill after date. If cutoff date is later than the bill after date, the system checks whether the accounting calendar is open for the accounting date. If the accounting calendar is open for the accounting date, the system creates the adhoc regular bill for the account in the online mode. Finally, the status of the invoice request is changed to **Processed**.

However, if the pending bill exists for the account, or if the cutoff date is earlier than or equal to the bill after date, or if the accounting calendar is not open for the accounting date, or if an error occurs while creating adhoc regular bill or its bill segments, the status of the invoice request is changed to **Error**. The system enables you to move such erroneous invoice request back to the **Draft** status.

However, if a manual regular bill generation invoice request is created for a person, the system checks whether the number of accounts of the person (if the **Include Person Hierarchy** option is not selected) or the number of accounts of the person and its child persons (if the **Include Person Hierarchy** option is selected) exceeds the limit defined in the **Account Limit** option type of the **C1-INVREQ** feature configuration. If the number of accounts does not exceed the account limit, the system derives the account of the person or the person and its child persons. Once the accounts are successfully derived, the status of the invoice request is changed to **Defer Processing Batch**.

However, if the number of accounts exceeds the account limit, the status of the invoice request is changed to **Account Derivation Pending**. On the **C1-INVREQ** batch execution, the system checks whether there are any invoice requests in the **Account Derivation Pending** status. If there is an invoice request in the **Account Derivation Pending** status, the system derives the accounts of the person or the person and its child persons. Once the accounts are successfully derived, the status of the invoice request is changed to **Defer Processing Batch**.

When you execute the **BILLOPEN** batch with the **Off Cycle Switch** parameter set to **Y**, the system checks whether the account that meets the search criteria is included in any invoice request which is in the **Defer Processing Batch** status. If the account is included in the invoice request, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date. If processing date is earlier than or equal to the batch business date, the system checks whether there is any record in the **Processing** status for the account in the invoice request. If so, the system checks whether the pending bill already exists for the account. If the pending bill does not exist for the account, the system checks whether the cutoff date is later than the bill after date. If cutoff date is later than the bill after date, the system checks whether the accounting calendar is open for the accounting date. If the accounting calendar is open for the accounting date, the system creates the adhoc regular bill for the account in the **Pending** status. When you execute the **BSGENREQ** batch with the **Off Cycle Switch** parameter set to **Y**, the system creates the bill segments for the adhoc regular bill. When you execute the **POSTPROC** batch with the **Off Cycle Switch** parameter set to **Y**, the system creates the post-

processing bill segments (if any) and completes the adhoc regular bill of the account. Finally, the status of the invoice request is changed to **Processed**.

However, if the pending bill exists for the account, or if the cutoff date is earlier than or equal to the bill after date, or if the accounting calendar is not open for the accounting date, or if an error occurs while creating adhoc regular bill or its bill segments, or if a To Do is generated for the bill review, the status of the record in the invoice request is changed to **Error**. If all records in the invoice request are in the **Error** status, the status of the invoice request is changed to **Error**. The system enables you to move such erroneous invoice request back to the **Draft** status.

You can optionally configure the approval process for the manual regular bill generation invoice request. If the **Approval Required** flag is set to **Yes** in the invoice request type, the status of the manual regular bill generation invoice request is changed to **Approval In Progress** when you submit the invoice request. The approver can then approve or reject the manual regular bill generation invoice request based on the observations.

Manual Trial Bill Generation Invoice Request

The manual regular bill generation invoice request and manual trial bill generation invoice request are created and processed identically with the following exceptions:

- On submitting the manual trial bill generation invoice request for an account, the system does not check whether the number of the billable charges of the account exceed the defer processing billable charge count. Therefore, the manual trial bill generation invoice request is always processed in the deferred mode.
- You need to specify the following parameters while executing the **BILLOPEN**, **BSGENREQ**, and **POSTPROC** batches:
 - **Bill Generation Type** (set to **Trial**)
 - **Description for Trial Billing Batch Run**
 - **Off Cycle Switch** (set to **Y**)
- The **BSGENREQ** batch will not freeze and complete a trail bill for the account.
- At present, a To Do is not generated for a trial bill review, and therefore the system does not check whether a To Do is generated for a trial bill review.

Automatic Regular Bill Generation Invoice Request

To enable the automatic invoice request creation feature for the fully-insured health care business, you need to attach the following algorithms:

If you want to create an automatic invoice request for an account while...	Then attach the algorithm....						
	Business Object	Status	System Event	Algorithm			
Activating a Fully-Insured Policy	C1-POLICY	In Force/Active	Enter	C1-INVREQCRE			
Note: This happens only on the customer onboarding. If an invoice request is already processed for any account in the person's hierarchy, the system will not create an invoice request for the account.							
Terminating a Fully-Insured Policy					Terminated	Enter	C1-INVREQPT
Reinstating a Fully-Insured Policy					Reinstated	Enter	C1-INVREPRIN
Renewing a Fully-Insured Policy		-	Audit	C1-IRPOLREW			
Creating an Account for a Parent Customer or Bill Group who is the Main Customer of the Fully-Insured Policy	C1-AccountBO	-	Post-Processing	C1-INVRACTPO			
Note: This happens only on the customer onboarding. If an invoice request is already processed for any account in the person's hierarchy, the system will not create an invoice request for the account.							

The above algorithms contain a parameter wherein you can specify the invoice request type using which the automatic invoice request should be created in the system.

If the automatic invoice request creation feature is configured for the fully-insured health care business, the system creates an automatic regular bill generation invoice request in the **Defer Processing Batch** status for an account when:

- A fully-insured policy is activated, terminated, reinstated, or renewed
- An account is created for a parent customer or bill group who is the main customer of the fully-insured policy

The deferred mode processing for manual regular bill generation invoice request and automatic regular bill generation invoice request is identical.

To implement this feature, the following screens are newly introduced in this release:

- Invoice Request Type
- Invoice Request (Used for Searching)
- Invoice Request (Used for Viewing)

Account Number Encryption

Oracle Revenue Management and Billing enables you to encrypt the **Account Number** field in the auto pay instruction of an account. To implement this requirement, you need to create a feature configuration using the **Encryption** feature type and set the **Field Encryption** option type as mentioned in the option type detailed description.

Formatting Objects Processor (FOP) Based Reporting

A new reporting feature is introduced in Oracle Revenue Management and Billing Version 2.9.0.0.0. It reads the data from the XML file and renders the output in the desired format using Apache FOP. It enables you to:

- Generate different types of reports in different formats, such as CSV, DOCX, JSON, PDF, WEB, XLS, and XML
- Generate and deliver customized reports to different departments and customers on time
- Generate bills and different types of letters in the PDF format
- Use organizational specific XSL template for each report
- Design a web based report and present data in different types of charts using the existing or custom groovy services

While creating a report, you need to specify the following:

- The format in which you want to generate the report
- The script using which you want to generate a Web based report
- The type of report (for example, bill, letter, etc.) that you want to generate

- The XSL template using which you want to generate the report in the desired format
- Whether you want to generate the report in the online or deferred mode (i.e. when the **C1-RPTGN** batch is executed)
- Whether you want to email the reports which are generated in the deferred mode

To implement this reporting feature, the following new screens are introduced in this release:

- **Report Details** – Enables you to create different types of reports.
- **Report Generation** – Enables you to generate reports where the reporting mode is set to **Online**.
- **Report Audit** – Enables you to download the report.

We recommend you to print bills and letters through this reporting feature instead of using Oracle Documaker. The FOP templates for different types of bills and letters are shipped with the product. You need to create a report for each type of bill and letter wherein the reporting mode is set to **Online**. Once the reports are created, you need to configure the system such that the bill or letter can be generated from the user interface. For more information on the bill and letter reports configuration, see *Oracle Revenue Management and Billing Bill and Letter Reports Configuration Guide*.

New Features (Specific to Financial Services)

This section describes the following new features added in this release which can be used in the financial services domain.

- Price Item Hierarchy
- Deal Modelling and Simulation

Price Item Hierarchy

Oracle Revenue Management and Billing enables you to define an entity hierarchy relationship and then associate a price item to an hierarchy entity in the entity hierarchy relationship. To create an entity hierarchy relationship, you first need to create the hierarchy entities. While creating a hierarchy entity, you need to specify the following:

- Level (for example, Level 1, Level 2, and so on) at which you can include the hierarchy entity in the entity hierarchy relationship. The system enables you to define hierarchy entities for Level 1 to Level 9.

Note: The system enables you to configure maximum hierarchy level in the **C1-EHRCONFIG** feature configuration. For example, if the maximum hierarchy level is set to 5, then you can define hierarchy entities for Level 1 to Level 5 and but not for Level 6 to Level 9.

- Division to which the hierarchy entity belongs.

Then, while defining an entity hierarchy relationship (i.e. hierarchy), you need to specify the following:

- Division to which the hierarchy belongs. Here, you can include only those hierarchy entities in the hierarchy which belong to the hierarchy's division.
- The date range for which the hierarchy is effective. When you associate a price item to a hierarchy, the association date range should be within the hierarchy date range.
- The hierarchy entity who is at the root level (i.e. Level 1) in the hierarchy. Here, you can only select those hierarchy entities which are defined for Level 1.

Note: This is the root from where hierarchy starts and hence only Level 1 entities are allowed to be placed at the root of entity hierarchy relationship.

- The hierarchy entities which you want to add in the subsequent levels (i.e. Level 2, Level 3, and so on) in the hierarchy and its parent hierarchy entity in the hierarchy.

Once the hierarchy is created, you can associate a price item to any level (i.e. hierarchy entity) in the hierarchy. You can associate a price item to a hierarchy entity only from the **Price Item** screen. The system enables you to define division-specific hierarchy for a price item. While specifying a hierarchy, you can only select the hierarchy which belongs to the respective division.

To implement this feature, the following screens are newly introduced in this release:

- Hierarchy Entity
- Entity Hierarchy Relationship

Deal Modelling and Simulation

Oracle Revenue Management and Billing enables you to create a deal for an existing customer, account, or prospect person. A deal facilities you to simulate the proposed pricing on the proposed commitments, and thereby analyze the cost, revenue, and profitability of the deal. The system provides different ways in which you can simulate the pricing for an existing customer, account, or prospect person. You can use the following simulation types while creating a deal:

- **Customer** – This simulation type can be used while creating a deal for an existing customer or a prospect person. If you use this simulation type for an existing customer, the system does the following:
 - Copies the customer, all its accounts, and the customer hierarchy (i.e. its child persons and child persons' accounts), and creates the corresponding prospect persons and accounts in the system
 - Copies the price list assignments and price assignments of the customer, accounts, child persons and child persons' accounts, and assigns the price lists and pricing to the respective prospect persons and accounts in the **Proposed** status
 - Copies the product enrollments of the customer's and child persons' accounts, and enrolls the respective prospect accounts for the products in the **Proposed** status
 - Copies the commitments from the SQI-based billable charges of the customer's and child persons' accounts (based on the deal frequency and usage period), and accordingly adds proposed commitments for the respective prospect accounts

However, if you use this simulation type for a prospect person, you need to manually:

- Assign a price list and pricing to the prospect person, its accounts, and to its hierarchy
- Enroll the prospect account for a product
- Add commitments for the prospect account
- **Account** – This simulation type can be used while creating a deal for an existing account. If you use this simulation type, the system does the following:
 - Copies the account and creates the corresponding prospect account in the system
 - Copies the price list assignments and price assignments of the account and assigns the price lists and pricing to the respective prospect account in the **Proposed** status
 - Copies the product enrollments of the account, and enrolls the respective prospect account for the products in the **Proposed** status
 - Copies the commitments from the SQI-based billable charges of the account (based on the deal frequency and usage period), and accordingly adds proposed commitments for the respective prospect account

- **Deal** – This simulation type can be used while creating a deal for an existing customer or a prospect person. If you use this simulation type for an existing customer, the system does the following:
 - Copies the customer and creates the corresponding prospect customer in the system
 - Copies the price list assignments and price assignments of the customer, and assigns the price lists and pricing to the respective prospect person in the **Proposed** status
 - Copies the commitments from the SQL-based billable charges of the customer's accounts (based on the deal frequency and usage period), and accordingly adds the rolled up proposed commitments for the respective prospect person

However, if you use this simulation type for a prospect person, you need to manually:

- Assign a price list and pricing to the prospect person
- Add commitments for the prospect person

There are various stages involved in the deal modelling:

- **Deal Creation** - While creating a deal, you need to specify various details, such as entity for which you want to create the deal, simulation type, deal type, deal date range, price selection date, deal frequency, usage period, review frequency, deal version, etc. You can maintain different versions of a deal. A deal version feature facilitates you to perform what-if analysis. Through each deal version, you can analyze the cost, revenue, and profitability for a different set of proposed pricing and commitments. However, you can only send one best version of a deal for the approval. The system then automatically discards the other versions in a deal.

A deal type helps the system to determine:

- Whether the pricing for each price item should be approved in the deal
- Whether the deal should be assigned to users for approval as per the limits defined in the deal approval profile
- Whether the pricing and financial summary should be approved by the respective division
- Whether the highest level approval is required for the deal
- Whether the existing pricing should be pre-approved in the deal
- The deal approval profile that should be used for a division level approval
- The deal approval profile that should be used for the deal level approval based on the division, customer segment, and customer tier combination

Whereas, the deal approval profile helps the system to determine:

- Different levels in the division or deal approval hierarchy which can approve the pricing and financial summary of the deal

Note: At present, you can add an approval level from 0 to 10. If required, you can add more approval levels in the system through the **C1_DEALHIERARCHYLEVEL** lookup field.

- To Do type using which a To Do should be created for the approver at each level

- To Do role whose users must receive the To Do for approval
- Whether the users at the approval level can propose a new pricing for a price item while approving the deal

Note: As per the business requirements, a deal level approver can only propose a new pricing for a price item while approving a deal. However, this feature is currently not implemented and would be available for use in the future release.

- Whether the users at the approval level can request the respective price item manager to approve the pricing for the price item
- Whether the users at the approval level can approve the deal
- Whether the users at the approval level should only view those price items for approval for whom floor and ceil limits are defined for the price item
- The minimum and maximum profitability, deviation, and revenue which the users at the approval level can approve in the deal

The system enables you to configure parallel approval at any level in the division or deal approval hierarchy. Once the deal is created in the **Draft** status, you can either skip the reference or provide the reference.

- **Reference Selection** - The system enables you to refer another customer, account, or deal for pricing and commitments. The system does the following when you select the respective reference:
 - **Customer** – You can refer another customer while creating a deal for an existing customer or a prospect person. If you use this reference, the system does the following:
 - Copies the price list assignments and price assignments of the referenced customer and assigns the price lists and pricing to the prospect person in the **Proposed** status
 - Copies the commitments from the SQI-based billable charges of the referenced customer's accounts (based on the deal frequency and usage period), and accordingly adds rolled up proposed commitments for the prospect person

In addition, if you use this reference for a prospect person, the system copies the hierarchy of the referenced customer when the **Refer Customer Hierarchy** option is selected.

- **Account** - You can refer another account while creating a deal for an existing account. If you use this reference, the system does the following:
 - Copies the price list assignments and price assignments of the referenced account and assigns the price lists and pricing to the prospect account in the **Proposed** status
 - Copies the commitments from the SQI-based billable charges of the referenced account (based on the deal frequency and usage period), and accordingly adds proposed commitments for the prospect account

- **Deal** - You can refer another deal which is created for a customer while creating a deal for an existing customer or a prospect person. And, you can refer another deal which is created for an account while creating a deal for an existing account. If you use this reference for an existing customer or a prospect person, the system does the following:
 - Copies the price list assignments and price assignments of the referenced deal's customer and assigns the price lists and pricing to the prospect person in the **Proposed** status
 - Copies the commitments from the SQI-based billable charges of the referenced deal's customer (based on the deal frequency and usage period), and accordingly adds proposed commitments for the prospect person

However, if you use this reference for an existing account, the system does the following:

- Copies the price list assignments and price assignments of the referenced deal's account and assigns the price lists and pricing to the prospect account in the **Proposed** status
- Copies the commitments from the SQI-based billable charges of the referenced deal's account (based on the deal frequency and usage period), and accordingly adds proposed commitments for the prospect account

Once you select or skip the reference, the system checks whether the number of accounts in the customer hierarchy exceeds the account limit defined in the **C1-Deal** feature configuration. If the number of accounts in the customer hierarchy does not exceed the account limit, the system creates the corresponding prospect persons and accounts immediately and then changes the status of the deal to **Pending Simulation**. However, if the number of accounts in the customer hierarchy exceeds the account limit, the status of the deal is changed to **Hierarchy Creation Deferred**. On executing the **C1_HRC** batch, the system checks whether there are any deals in the **Hierarchy Creation Deferred** status. If so, the system creates the corresponding prospect persons and accounts for the deal and then changes the status of the deal to **Pending Simulation**.

- **Simulation** – Once the deal is in the **Pending Simulation** status, you can do the following:
 - Assign a new price list to the prospect person or account
 - Edit/override the proposed price assignment of the prospect person or account
 - Enroll the prospect account for a new product
 - Edit the proposed commitments of the prospect account

Once the required changes are made to the deal, you can simulate the proposed pricing on the proposed commitments. In other words, you can simulate the deal version. On simulating a deal version, the system checks whether the proposed commitments exceed the limit defined in the **C1-Deal** feature configuration. If the proposed commitments do not exceed the limit, the system calculates the cost, revenue, and profitability for the deal version immediately and then changes the status of the deal to **Simulated**. However, if the proposed commitments exceed the limit, the status of the deal is changed to **Simulation Deferred**. On executing the **C1_SMLD** batch, the system checks whether there are any deals in the **Simulation Deferred** status. If so, the system calculates the cost, revenue, and profitability for the deal version and then changes the status of the deal and its version to **Simulated**.

- **Price Item Approval** – If the **Price Item Approval Required** field is set to **Yes** in the deal type, the pricing of all the price items should be approved before the deal is approved. An approver at any level in the division or deal approval hierarchy can approve the pricing of a price item when the pricing falls within the floor and ceil limits of the approver. Additionally, if the **Submit Price Item for Approval** field is set to **Yes** for an approval level, the approver at the respective level can request the price item manager to approve the pricing for the price item. On clicking the **Submit Price Item for Approval** button, the status of the deal is changed to **Pending for Approval**.
- **Division Level Approval** – If the **Division Level Approval Required** field is set to **Yes** in the deal type, the system creates a To Do for the approver at the first level in the division approval hierarchy. The approver can either approve the division-specific pricing and financial summary or request the submitter to resubmit the deal for approval after making the required changes. If the approver at the first level in the division approval hierarchy approves the division-specific pricing and financial summary, or if the approver at the first level in the division approval hierarchy cannot approve the division-specific pricing and financial summary, the system creates a To Do for the approver at the next level in the division approval hierarchy. This process continues until the approval is received from all the levels in the division approval hierarchy.
- **Deal Level Approval** – Once the approval is received from all the levels in the division approval hierarchy, the system creates a To Do for the approver at the first level in the deal approval hierarchy. The approver can either approve the deal or request the submitter to resubmit the deal for approval after making the required changes. If the approver at the first level in the deal approval hierarchy approves the deal and if the highest level approval is not required, the system changes the status of the deal to **Approved**. However, if the approver at the first level in the deal approval hierarchy cannot approve the deal, the system creates a To Do for the approver at the next level in the deal approval hierarchy. This process continues until the deal is approved by any level in the deal approval hierarchy. However, if the highest level approval is required for the deal, this process continues until the deal is approved by the highest level in the deal approval hierarchy.
- **Deal Finalization** – Once a deal is approved, you can finalize the deal. On clicking the **Finalize** button, the status of the deal is changed to **Finalized**.
- **Customer Acceptance** – The system enables you to either accept or reject the finalized deal based on the customer feedback. On clicking the **Accept** button, the status of the deal is changed to **Customer Accepted**. However, on clicking the **Reject** button, the status of the deal is changed to **Rejected**.

- **Apply Back or Orchestration** – Once the deal is accepted for an existing customer or account, you can click the **Apply Back** button. On clicking the **Apply Back** button, the system does the following:
 - Copies a new proposed price list assignment and assigns the price list to the respective customer or account in the **Active** status
 - Ends the price assignment of the respective customer or account when it is overridden or edited for the prospect customer or account
 - Creates a new price assignment for respective customer or account when it is overridden or edited for the prospect customer or account
 - Copies a new proposed product enrollment and enrolls the respective account for the product in the **Active** status

The customer acceptance date is used as the start date while adding the new price list assignments, price assignments, and product enrollments.

Once the above changes are made, the system changes the status of the deal to **Fully Orchestrated**. The system enables you to onboard a prospect person or account through the File Upload Request utility. Once the person or account is created, the system checks whether there is any deal with the specified deal identifier in the **Customer Accepted** status. If so, the system checks whether the primary person or account identifier matches with the primary prospect person or account identifier, respectively. If so, the system adds the person or account ID corresponding to the prospect person or account. Then, the system changes the status of the deal to **Partially Orchestrated**. Once the system creates persons and accounts for the entire prospect hierarchy, the status of the deal is changed to **Fully Orchestrated**.

To implement the Deal Modelling and Simulation feature, the following new screens are introduced in this release:

- Deal Approval Profile
- Deal Type
- Prospect
- Deal Dashboard
- Deal Information
- Mapping Terms and Conditions
- Approver Dashboard

Note: The Deal Modelling and Simulation feature is tested and certified on Google Chrome and not on Internet Explorer.

New Features (Specific to Insurance)

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

- Off-Process Request
- Accumulation Data
- Terminal Liability Reserve (Run Out) Level Funding

Off-Process Request

There might be situations in the Administrative Services Only (ASO) business wherein the insurance company or health care customer (i.e. Employer) would like to change agreed limits or funds within the policy period. For example, a need may arise to change the ASL limit, minimum or maximum discount limit, or settlement or runout funds. This will impact the stop-loss, discount arrangement, and level funding calculation, respectively. In addition, there might be situations wherein the aggregated amount might require a change due to corrections in the claim transactions or due to migration of customers for whom the stop-loss is pre-accumulated and billed in the legacy system.

Oracle Revenue Management and Billing provides a mechanism through which the following agreed limits, funds, or calculated amounts can be amended within the policy period:

Accumulation Category	Field Value
Specific Stop-Loss (SSL)	Aggregated Amount
Aggregate Stop-Loss (ASL)	Aggregated Amount
	ASL Limit
	SSL Cumulative Credits
Level Funded	Aggregated Amount
	Settlement Fund
	SSL Cumulative Credits
	ASL Cumulative Credits
	Runout Fund
Discount Arrangement	Aggregated Amount
	Minimum Discount Limit
	Maximum Discount Limit

The system enables you to amend the above mentioned accumulation field values through an off-process request. As its name suggests, an off-process request is an adhoc request to create an adjustment or billable charge through which the system can amend the above mentioned accumulation field values.

While creating an off-process request, you need to specify an off-process request type using which you want to create the off-process request. It is the off-process request type which helps the system to determine:

- The business object using which the off-process request should be created in the system
- Whether the system should create an adjustment or billable charge to amend the above mentioned accumulation field values
- Whether the approval is required for the off-process request
- The accumulation categories whose field values can be amended through the respective off-process requests
- The accumulation fields whose values can be amended through the respective off-process requests
- The default adjustment type using which the adjustment should be created when the amendment mode is set to **Adjustment**
- The default billable charge line type using which the billable charge should be created when the amendment mode is set to **Billable Charge**
- The type of contract against which the adjustment or billable charge should be created for the account

Once you specify the off-process request type, you need to specify the following:

- The parent customer (i.e. person whose person type is set to **Parent Customer**) for which you want to create an off-process request
- The accumulation category whose field value you want to amend through the off-process request
- The accumulation field whose value you want to amend through the off-process request

Note: Here, you can select only those accumulation categories and fields for which the contract type and adjustment type or billable charge line type information is available in the respective off-process request type.

- The accumulation group for which the changes should be reflected in the system

Note: If the accumulation category is set to **Specific Stop-Loss**, you can only select the accumulation group defined at the bill group level. However, if the accumulation category is set to **Aggregate Stop-Loss, Discount Arrangement, or Level Funded**, you can only select the accumulation group defined at the parent customer level.

- The account for which the adjustment or billable charge should be created in the system
- The amount which you want amend through the off-process request
- The adjustment type using which the adjustment should be created when the amendment mode is set to **Adjustment** in the respective off-process request type

- The billable charge line type using which the billable charge should be created when the amendment mode is set to **Billable Charge** in the respective off-process request type
- The member or main subscriber for whom the field value should be amended in the system

Note: You need to specify the member or main subscriber when the accumulation category is set to **Specific Stop-Loss**.

- The date (i.e. effective date) when the field value should be amended in the system

Note: If the amendment mode is set to **Adjustment**, the above date is stamped as the accounting date. However, if the amendment mode is set to **Billable Charge**, the above date is stamped as the billable charge start and end dates.

- The coverage period for which the amendment is applicable

Note: The coverage period is stored for the informational purposes only and is not considered during accumulation.

Once an off-process request is created in the **Draft** status, you can edit, delete, or submit the off-process request. On submitting an off-process request, the system creates the adjustments or billable charges to amend the accumulation field values. Finally, the status of the off-process request is changed to **Processed**.

Note: The off-process request through which the adjustment is created is stored in the **Comments** field. And, the off-process request through which the billable charge is created is stored in the **GRP_REF_VAL** column.

You can optionally configure the approval process for the off-process request. If the **Approval Required** flag is set to **Yes** in the off-process request type, the status of the off-process request is changed to **Approval In Progress** when you submit the off-process request. Once the approver approves the off-process request, the status of the off-process request is changed to **Approved**. The system then creates the adjustments or billable charges to amend the accumulation field values. Finally, the status of the off-process request is changed to **Processed**. However, if the approver rejects an off-process request, the status of the off-process request is changed to **Rejected**.

These adjustments or billable charges are then considered in the accumulation run when the adjustment date or billable charge start and end dates fall within the accumulation cycle. Depending on the accumulation category, the adjustment or billable charge is considered when the **C1-ACSSL**, **C1-ACASL**, **C1-ACDA**, or **C1-ACLF** batch is executed.

To implement this feature, the following screens are newly introduced in this release:

- Off-Process Request Type
- Off-Process Request (Used for Searching)
- Off-Process Request (Used for Viewing)

Accumulation Data

A new screen named **Accumulation Data** is introduced in this release. It enables you to view the specific stop-loss, aggregate stop-loss, discount, and level funded accumulation details. It contains the following zones:

- **Search Parent Accumulation Group** – Enables you to search for a parent accumulation group whose accumulation details you want to view. You can search a parent accumulation group which is created for either of the following accumulation category:
 - Specific Stop-Loss
 - Aggregate Stop-Loss
 - Discount Arrangement
 - Level Funded
- **Specific Stop-Loss Accumulation Amount** – Enables you to view how the specific stop-loss is calculated in each accumulation run. In addition, you can view the specific stop-loss billable charge which is created in each accumulation run.
- **Aggregate Stop-Loss Accumulation Amount** - Enables you to view how the aggregate stop-loss is calculated in each accumulation run. In addition, you can view the aggregate stop-loss billable charge which is created in each accumulation run.
- **Discount Arrangement Accumulation Amount** - Enables you to view how the discount is calculated in each accumulation run. In addition, you can view the discount billable charge which is created in each accumulation run.
- **Level Funded Accumulation Amount** - Enables you to view how the charges eligible for level funding are calculated in each accumulation run. In addition, you can view the level funded billable charge which is created in each accumulation run.
- **Off-Process Adjustment/Billable Charges** – Enables you to view the adjustments or billable charges created through an off-process request which are used in the accumulation run.
- **Transaction Information** – Enables you to view the claim transactions for which the specific stop-loss, aggregate stop-loss, discount, or charges eligible for level funding are accumulated.
- **Transaction Leg Calculation Lines** - Enables you to view calculation lines of all legs of the transaction which are rated before billing.
- **Transaction Leg Calculation Line Characteristics** – Enables you to view the characteristics of a calculation line.

You can navigate to the **Accumulation Data** screen from the **Financial Query** menu.

Terminal Liability Reserve (Run Out) Level Funding

Oracle Revenue Management and Billing provides a mechanism to maintain terminal liability reserve for a self-funded policy through level funding. Now, the system supports the following types of level funding:

- Regular Enrollment Based Level Funding Without Terminal Liability Reserve (TLR)
- Flat Rate Based Level Funding Without TLR
- Regular Enrollment Based Level Funding With TLR
- Flat Rate Based Level Funding With TLR

The **C1-PricingRuleTypeLF** and **C1-PricingRuleLevelFunded** business objects are extended to support the TLR feature. Therefore, you can now define pricing rule types for the above listed types of level funding. While creating a level funding pricing rule type with TLR feature, you need to specify the following:

- **Terminal Liability Reserve (Run Out) Funding Required** – Used to indicate whether you want to define a level funding pricing rule type with TLR.
- **Claim Fund Off-Process Request Type** – Used to indicate the off-process request type using which the off-process request should be created in the **C1-BCLF** batch. Through this off-process request, the system creates billable charge when the customer decides to roll forward the claim fund.
- **Run Out Fund Off-Process Request Type** - Used to indicate the off-process request type using which the off-process request should be created in the **C1-BCLF** batch. Through this off-process request, the system creates billable charge when the customer decides to roll forward the run out fund.
- **Run Out Fund Pricing Rule Type** – Used to specify a bill period based recurring flat fee pricing rule type or retention type enrollment based pricing rule type which you want to use for calculating the run out fund.
- **Run Out Fund Price Item** – Used to specify the price item which you want to use for calculating the run out fund.
- **Run Out Billable Charge Line Type** – Used to specify the billable charge line type using which you want to create calculation line while settling charges, stop-loss, or discount through run out fund in the runout period.
- **Run Out Surplus Billable Charge Line Type** - Used to specify the billable charge line type using which you want to create the calculation line when the surplus run out funds are left with the ASO provider at the time of settlement.
- **Run Out Deficit Billable Charge Line Type** - Used to specify the billable charge line type using which you want to create the calculation line when the run out funds are in deficit at the time of settlement.

Now, the system enables you to specify the settlement rules while creating a level funding pricing rule type with or without TLR feature. While defining settlement rules, you need to specify the following:

- The policy status for which the settlement rules are applicable
- The fund type (i.e. claim or run out fund) for which you want to define the settlement rules

- The customer action (i.e. cancel or renew the self-funded policy) based on which you want to either close or roll forward the surplus or deficit claim or run out fund

The system provides an option to indicate whether the settlement rules specified for a claim or run out fund are editable. Accordingly, you can change the settlement rules when you create a pricing rule using the pricing rule type for a parent customer.

Now, the system enables you to create a different level funded pricing rule for each policy status at the parent customer level.

Enhancements (Generic)

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

- Billing
- Entity Audit
- View Billed Transactions
- Person Information
- Pricing Management

Billing

The following changes are made to the Billing feature:

- Earlier, the **BILLOPEN**, **BSGENREG**, and **POSTPROC** batches were used for construct based billing. Now, you can use these batches for construct as well as non-construct based billing.
- The following parameter is added to the **BILLOPEN**, **BSGENREG**, and **POSTPROC** batches:
 - **Off Cycle Switch** – Used when you want to create adhoc bills for accounts through an invoice request. It considers the invoice requests for the accounts which are in the **Deferred Processing Batch** status. The valid value is **Y**. If you specify any value other than **Y** or if you leave this parameter blank, the batch creates bills for the accounts as per the bill cycle defined for the account.
- The **Bill OraSearch** is enhanced to support search using the bill characteristics. You will notice this change across the system wherever the orasearch feature is used corresponding to the **Bill ID** field. Note that, at present, this change is not implemented in the **Bill Search** window which appears on clicking the **Search** option from the **Bill** sub-menu in the **Financial** menu.
- The following parameter is newly added in the **C1-BILLSEG** algorithm type:
 - **Catch Up Flag For Cancelled Bill Segments Of Recurring Billable Charges** – Used to indicate whether a canceled bill segment of a recurring billable charge should be billed in the next bill cycle. The valid values are:
 - **Y** - Used when you want to rebill a cancelled bill segment of a recurring billable charge.
 - **N** - Used when you do not want to bill a cancelled bill segment of a recurring billable charge.

If you do not specify the value, by default, it is set to **N**. Note that this parameter is only applicable for the recurring billable charges and not for the one-time or pass-through billable charges. The system will rebill a canceled bill segment of a one-time or pass-through billable charge irrespective of whether this parameter is set to **Y** or **N**.

- The following parameter is newly added in the **C1-BILLTOLR** algorithm type:
 - **Skip Bill To Do Creation For First Bill With No Financial Transaction** – Used to indicate whether To Do creation for the bill review should be skipped when the first bill generated for the account has no financial transactions associated with it. The valid values are – **true** and **false**. If you do not specify the value, by default, it is set to **false**.
- The following options types are newly added in the **C1_FINTRANOP** feature configuration:
 - Skip Priceitem Contract Type Validation
 - Rate Component Step Optimization
 - Trial Bill Characteristics Conversion
 - Allow Caching Of Rule Based Autopay List
 - Avoid Pricing Crawling if Rate Schedule present at Contract

For more information about these option types, see *Oracle Revenue Management and Billing Banking User Guide*.

- A new batch named **Generate Credit or Correction Note for Bill (C1-BLCRN)** is introduced in this release. It is used to generate a credit or correction note for a bill or a new bill for an account. For more information, see *Oracle Revenue Management and Billing Batch Guide*.

Entity Audit

The following changes are made to the Entity Audit feature:

- The **Search Audit Event** zone is enhanced to support the search using the audit event details, such as effective date, entity, entity ID, and audit event type.

View Billed Transactions

The following changes are made to the View Billed Transactions screen:

- Earlier, the **View Billed Transactions** screen was introduced for the **Transaction Feed Management** feature. It enabled you to view the details of a bill and its bill segments. In addition, it enabled you to:
 - View the SQ details of each bill segment
 - View the transactions whose charges were billed through each bill segment. In other words, it enabled you to trace the source of the bill segment.

Now, this screen is redesigned to support the business requirements of both the insurance and financial services domains. This screen is renamed to **Bill Drill Down Details**.

- Earlier, you were able to navigate to this screen through the **Transaction Feed Management** menu. However, now, you can navigate to this screen from the **Financial** menu.
- Now, the **Bill Drill Down Details** screen enables you to trace the source of various billing elements, such as bill and billable charge. It contains the following zones:
 - **Search Billing Element** – Enables you to search for a bill or a billable charge using various search criteria.
 - **Bill Segments** – Enables you to view the bill segments of the bill.
 - **SQ Details** – Enables you to view the service quantity identifiers (SQIs) used in the bill segment calculation. It appears only when the bill segment is generated for an SQI based billable charge.
 - **Bill Segment Calculation Lines** – Enables you to view the calculation lines of the bill segment.
 - **Timeline and Billable Charge Details** – Enables you to view the timelines which are derived during the membership premium calculation. It appears only when the timeline details are available for the billable charge for which the bill segment is created.
 - **Pricing Calculation Details** – Enables you to view how the amount is calculated for the timeline. If the age based pricing is used during the membership premium calculation, this zone lists the premium calculated for each eligible member of the membership. It also displays the base fee and modifier fee which are applicable for each eligible member. However, if the tier based pricing is used during the membership premium calculation, this zone lists the premium calculated at the membership level.

- **Transaction Details** – Enables you to view the transactions whose charges are billed through the bill segment. It appears only when the bill segment is generated for a billable charge which is created through the transaction aggregation process.
- **Transaction Leg Calculation Lines** – Enables you to view calculation lines of all legs of the transaction which are rated before billing.

Person Information

The following changes are made to the Person screen:

- Now, you can specify the segment and tier to which a person belongs in the **Person** screen. To implement this requirement, two new custom lookup fields named **CUST_SEG_FLG** and **CUST_TIER_FLG** are introduced in this release.
- You can also specify the relationship manager for a person in the **Person** screen. Here, a relationship manager is a user who is already defined in the system.

Pricing Management

The following changes are made to the Pricing Management feature:

- The **Price Item** screen is redesigned, thereby enabling you to maintain:
 - **Division-Specific Hierarchy for Each Price Item** – The system enables you to specify the entity hierarchy to which a price item belongs in a division. At present, this data is used for informational purposes only and has no billing impact. While defining division-specific entity hierarchy for a price item, you need to specify the following:
 - **Hierarchy** – Used to indicate the hierarchy to which you want to associate the price item.
 - **Parent Entity** – Used to indicate the entity in the hierarchy to which you want to associate the price item.
 - **Start Date** – Used to specify the date from when the price item is associated with the hierarchy entity.
 - **End Date** - Used to specify the date till when the price item is associated with the hierarchy entity.
 - **Different Types of Division-Specific Cost for Each Price Item** – The system enables you to specify different types of cost incurred in a division for a price item. If a price item is used in a deal, the division-specific costs are used for calculating profitability of the deal. While defining division-specific costs for a price item, you need to specify the following:
 - **Effective Date** – Used to specify the date from when the cost is effective for the price item.
 - **Cost Type** – Used to indicate the type of cost incurred in the division for the price item. The valid values are:
 - Additional Fixed Cost
 - Additional Variable Cost

- Fixed Third Party Cost
- Fixed Internal Cost
- Variable Internal Cost
- Variable Third Party Cost
- **Cost Value** – Used to specify the cost amount.
- **Cost Currency** – Used to specify the currency in which the cost is incurred. The system does currency conversion when the deal currency is different from the cost currency.
- **Division-Specific Floor and Ceiling Values for Each Price Item** - The system enables you to specify the floor and ceiling type for each price item. At present, the system supports the following floor and ceiling types for a price item:
 - Absolute Value Range

Once the floor and ceiling type of a price item is set to **Absolute Value Range**, you can define division-specific floor and ceiling values for the price item. The floor and ceiling values are used while approving the pricing for the price item in a deal. The relationship manager (i.e. the person who has created the deal) or an approver at any level in the division or deal approval hierarchy can approve the pricing for a price item only when the pricing is within the floor and ceil limits of the To Do role to which the relationship manager (RM) or approver belongs. For example, if the pricing of P1 is \$25 in a deal and the floor and ceil limits of the RM is \$10-\$15, then the RM cannot approve the pricing of P1 in the deal.

While defining division-specific floor and ceiling values for a price item, you need to specify the following:

- **To Do Role** – Used to specify the role whose users can approve the pricing for the price item.
- **Floor Value** – Used to specify the floor limit for the To Do role. The users who belong to the To Do role cannot approve the pricing for the price item when it is below the floor limit.
- **Ceil Value** – Used to specify the ceiling limit for the To Do role. The users who belong to the To Do role cannot approve the pricing for the price item when it is above the ceiling limit.
- **Floor and Ceil Currency** – Used to indicate the currency in which the floor and ceil limits are specified. The system does the currency conversion when the pricing currency is different from the floor and ceil currency.

- The system enables you to specify the price item manager's To Do type and To Do role for each price item. On clicking the **Send Price Item for Approval** button in the **Deal Information** screen, the relationship manager or the approver at any level in the division or deal approval hierarchy can request the price item manager to approve the pricing for the price item. The system then creates a To Do using the To Do type which is specified in the **Price Item Manager To Do Type** field and assigns it to the users who belong to the role which is specified in the **Price Item Manager To Do Role** field.

Note that the price item manager can approve the pricing for the price item only when the floor and ceil limits are defined for the price item manager's To Do role.

Approval Workflow

The following changes are made to the Approval Workflow feature:

- The following option types are newly added in the **C1_AXENTITY** feature configuration:
 - Approval Transaction screen Timeout
 - Display only Differences of fields on UI

For more information about these option types, see *Oracle Revenue Management and Billing Banking User Guide*.

Financial Transactions

The following changes are made to the Financial Transactions feature:

- A new algorithm type named **C1-STMPFTINI** is introduced in this release. It is used to create entries in the **C1_FT_EXT** table when a financial transaction of the following financial transaction type is frozen:
 - Bill Segment (BS)
 - Bill Cancellation (BX)
 - Adjustment (AD)
 - Adjustment Cancellation (AX)

If you want to create entries for the financial transactions of an account in the **C1_FT_EXT** table, you must attach this algorithm to the **FT Freeze** system event of the respective customer class.

Enhancements (Specific to Financial Services)

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

- Construct Based Billing

Construct Based Billing

The following changes are made to the Construct Based Billing feature:

- Now, while defining a criteria in a construct, the system provides the OraSearch functionality when the account identifier type and person identifier type are used as bind variables in the template.
- Additional filter named **Criteria** is added in the following zones:
 - Include Usage/Invoice Accounts
 - Include Billable Charges
 - Include Adjustments
- Additional filter named **Priority** is added in the following zones:
 - Include Usage/Invoice Accounts
 - Include Billable Charges
 - Include Adjustments
 - Include Bill Segments
- A new field named **Template Selection Algorithm** is available while defining, editing, and copying a construct. It enables you to specify an algorithm using which the system can determine the eligible billable charge selection templates. A template selection algorithm is invoked when you execute the **BILLOPEN** batch.

If an algorithm is attached to the **Template Selection Algorithm** field, the system only executes the criteria which is defined using the eligible billable charge selection templates while fetching the billable charges for each usage account linked to the construct. However, if an algorithm is not attached to the **Template Selection Algorithm** field, the system executes all the billable charge selection criteria while fetching the billable charges for each usage account linked to the construct.

A template selection algorithm type is not shipped with the product. You need to create a template selection algorithm type which accepts the following inputs parameters - **Usage Account ID**, **Construct ID** and **Effective Start Date**, and returns a list of eligible billable charge selection templates.

- The **Settlement Currency Validation Required** option type is newly added in the **C1-INCT** feature configuration. For more information about the option type, see *Oracle Revenue Management and Billing Banking User Guide*.

Enhancements (Specific to Insurance)

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

- Customer 360° View
- Policy, Plan, and Membership
- C1-ASOBLLNG Feature Configuration
- Repricing
- Inbound Message
- Fully-Insured Pricing Rules
- Fully-Insured Policy Plan Contract Creation
- Charge Type
- Self-Funded Pricing
- Trial Billing
- Entity Audit

Customer 360° View

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

- Earlier, you were able to search for a person, account, or policy using the person's primary name. However, now, you can search for a person, account, or policy using the person's primary or secondary name.
- Now, you can view a list of the primary and non-primary names of the person in the **Person Information** zone.
- Through the **Customer 360° Information – Account** tab, you can view the trial bills which are generated for the account.
- Now, you can view the billing information of an account, such as the bill cycle and bill after date, in the **Account Information** zone.
- Earlier, the bills which are created for the account either manually from the user interface or automatically through the batches were listed in the **Billed Vs Paid** zone. Now, in addition, the bills which are created for the account through a manual or automatic invoice request are also listed in the **Billed Vs Paid** zone.
- Now, the **Bill Information** screen also enables you to view:
 - SQ details of each bill segment which is generated through an SQI based billable charge
 - Calculation lines of each bill segment
 - Transactions whose charges are billed through each bill segment
 - Calculation lines of all legs of a transaction which are rated before billing

To implement this business requirement, four new zones named **SQ Details**, **Bill Segment Calculation Lines**, **Transaction Details**, and **Transaction Leg Calculation Lines** are added to the **Bill Information** screen.

Policy, Plan, and Membership

The following changes are made to the Policy, Plan, and Membership feature:

- The system no longer enables you to delete a policy, plan, and membership throughout the lifecycle.
- The **Pending Termination Overridden** status is removed from the lifecycle of the **C1-POLICY** business object.
- The **Inactive** status is added to the lifecycle of the **C1-Membership** business object. Whereas, the **Change Coverage** and **Cancelled** statuses are removed from the lifecycle of the **C1-Membership** business object.
- You can inactivate a membership whenever required. You can also inactivate a member person whenever required. If you inactivate a member person who is the main subscriber, the system automatically inactivates the membership and all other member persons which are included in the membership.
- You can inactivate a member person or membership from the user interface or through a health care inbound message.
- Through the **Membership - Contracts and Charges** tab, you can view the one-time or recurring billable charges which are created for the membership. It also enables you to view the corresponding bill segments, timelines which are derived during the membership premium calculation, and how the amount is calculated for the timeline.
- Two new algorithms named **C1-MEMSTPRE** and **C1-MEMINACT** are attached to the **C1-Membership** business object.
- The system enables you to search for a policy using its characteristics in the **Search Policy** zone.
- The **Price Item** field in the **Search Membership** zone enables you to search for memberships which belong to plans where a particular price item is directly associated.
- Earlier, you were able to search for memberships only using the policy plan number. However, now, you can search for memberships using various policy plan details, such as plan number, plan start and end dates, plan name, plan characteristics, or using the price items included in the pricing rule types which are associated with the policy plan.
- Earlier, you were able to search for a membership using the membership start and end dates and membership status. Now, in addition, you can search for a membership using the membership ID, external membership ID, and its characteristics.
- Earlier, you were able to search for memberships using the policy holder details. However, now, you can search for memberships using the member person details.

C1-ASOBLNG Feature Configuration

The following option types are newly added in the **C1-ASOBLNG** feature configuration:

- **Membership Inactive Status** - Used to specify the status to which the membership must be transitioned when the main subscriber is inactivated.
- **Membership Person Inactive Status** - Used to specify the status to which the member persons must be transitioned when the membership is inactivated.
- **Plan Based Contract Creation Eligibility** – Used to indicate whether the system should create plan-specific contract for a price item on the account. The valid value is **Yes**.
- **Plan Based Contract Characteristic Type** – Used to specify the characteristic type which helps to determine whether the system should create plan-specific contracts for a price item. This characteristic must be defined on the person for whom you want to create plan-specific contracts on the accounts. Here, you must specify a characteristic type where the characteristic entity is set to **Person**.
- **Plan Based Contract Characteristic Value** – Used to specify the characteristic value which indicates that the system should create plan-specific contracts for a price item on the accounts.
- **Plan ID Characteristic Type** – Used to specify the characteristic type where you want to store the plan for which the contract is created. During the fully-insured policy plan contract creation, this characteristic is defined on the contract. Here, you must specify a characteristic type where the characteristic entity is set to **Contract**.
- **Account Identifier Type Char Type** – Used to specify the characteristic type which is used to store the identifier type of the account to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Account Identifier Value Char Type** - Used to specify the characteristic type which is used to store the identifier of the account to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Person Identifier Type Char Type** – Used to specify the characteristic type which is used to store the identifier type of the person to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Person Identifier Value Char Type** - Used to specify the characteristic type which is used to store the identifier of the person to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Off-Process Request Detail Maximum Count** – Used to indicate the maximum number of amendment details you can specify in an off-process request.
- **Policy Renewal Status** - Used to specify the status to which the policy must be transitioned when it is renewed.
- **Approval Workflow Group for MPP** - Used to specify the approval workflow group for a minimum premium program pricing rule. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting a minimum premium program pricing rule.
- **Bill Seg Req Reference Id Char Type** – Used to indicate the characteristic type where you want to store the request reference ID of the repricing request for which the bill segment calculation line is created. During bill segment generation, this characteristic is stamped on the bill segment

calculation line. Here, you must specify a characteristic type where the characteristic entity is set to **Bill Segment Calc Line**.

For more information about these option types, see *Oracle Revenue Management and Billing Insurance User Guide*.

Repricing

The following changes are made to the Repricing feature:

- Now, while deriving a bill group, the system first checks whether the characteristics specified in the following option types of the **C1-ASOBLNG** feature configuration are defined for a membership:
 - **Account Identifier Type Char Type** – Used to specify the characteristic type which is used to store the identifier type of the account to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
 - **Account Identifier Value Char Type** - Used to specify the characteristic type which is used to store the identifier of the account to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.

If the above two characteristics are defined for the membership, the system derives the account and then the person (i.e. bill group or parent customer) to which the account belongs. In this case, it does not derive the bill group using the Bill Level 1, Bill Level 2, Bill Level 3, and Bill Level 4 characteristics which are defined on the membership.

However, if the above two characteristics are not defined for the membership, the system then checks whether the characteristics specified in the following option types of the **C1-ASOBLNG** feature configuration are defined for the membership:

- **Person Identifier Type Char Type** – Used to specify the characteristic type which is used to store the identifier type of the person to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Person Identifier Value Char Type** - Used to specify the characteristic type which is used to store the identifier of the person to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.

If the above two characteristics are defined for the membership, the system derives the person (i.e. bill group or parent customer) to which the membership should be billed. In this case, it does not derive the bill group using the Bill Level 1, Bill Level 2, Bill Level 3, and Bill Level 4 characteristics which are defined on the membership.

However, if the above two characteristics are not defined for the membership, the system then derives a bill group using the Bill Level 1, Bill Level 2, Bill Level 3, and Bill Level 4 characteristics which defined on the membership.

- A new screen named **Repricing Request** is introduced in this release. It contains the following zones:
 - **Search Repricing Entity Detail Record** – Enables you to search for repricing entity detail records which are:
 - Created for a particular audit event
 - Created for all audit events of a particular membership
 - **Repricing Requests** – Enables you to view the repricing requests which are created for a particular repricing entity detail record.
 - **Timeline and Billable Charge Details** – Enables you to view the timelines and billable charges generated for a repricing request.
 - **Pricing Calculation Details** – Enables you to view how the premium is calculated for the membership (in case of tier-based pricing) and how the premium is calculated for each eligible member in the membership (in case of age-based pricing).

There are two ways in which you can navigate to this screen:

- One from the **Audit Event** screen - In this case, the system automatically uses the audit event ID for searching and then lists the repricing entity detail records which are created for the respective audit event in the **Search Repricing Entity Detail Record** zone.
- Another from the **Pricing Management** menu - In this case, the system enables you to search for repricing entity detail records of a particular audit event or for all audit events of a particular membership.

Note: At present, the **Repricing Request** screen is only designed to meet the business requirements of the Fully-Insured Health Care domain.

Inbound Message

The following changes are made to the Inbound Message feature:

- Earlier, you were able to specify various address details in a health care inbound message. For example, address effective date, address type, address line 1, address line 2, address line 3, address line 4, city, state, zip, and country. Now, in addition, you can specify the house type, street numbers, in city limit, geographical code, and county in the address.
- Now, a health care inbound message enables you to define characteristics for an age-based and tier-based pricing rules.
- The way, entity information was captured for the age-based and tier based pricing rules has changed in this release. Now, you need to specify the policy number, source system, and plan number to identify the plan for which the age-based or tier based pricing rule is defined.
- The following tags are added in the health care inbound message schema:

Parent Tag	New Tags
<address>	<houseType></houseType> <streetNumber1></streetNumber1> <streetNumber2></streetNumber2>

Parent Tag	New Tags
	<pre><inCityLimit></inCityLimit> <taxVendorGeographicalCode></taxVendorGeographicalCode> <county></county></pre>
<personAddressOverride>	<pre><houseType></houseType> <streetNumber1></streetNumber1> <streetNumber2></streetNumber2> <inCityLimit></inCityLimit> <taxVendorGeographicalCode></taxVendorGeographicalCode> <county></county></pre>
<pricingRuleData>	<pre><status></status> <characteristics> <characteristicsList> <characteristicType></characteristicType> <characteristicValue></characteristicValue> <effectiveDate></effectiveDate> </characteristicsList> </characteristics></pre>

- The following tags are replaced with new tags in the health care inbound message schema:

Parent Tag	Old Tags
<pricingRuleData>	<pre><entityType></entityType> <entityIdentifier></entityIdentifier></pre>
	<p>New Tags</p> <pre><entityIdentifiers> <entityIdentifiersList> <entityIdentifierType></entityIdentifierType> <entityIdentifierValue></entityIdentifierValue> </entityIdentifiersList> </entityIdentifiers></pre>

Fully-Insured Pricing Rules

The following changes are made to the fully-insured pricing rules:

- The system enables you to define characteristics for the age-based and tier-based pricing rules through a health care inbound message.

Fully-Insured Policy Plan Contract Creation

The following changes are made to the Fully-Insured Policy Plan Contract Creation feature:

- Until now, if a policy had multiple plans and each plan was associated with one or more pricing rule types which had the same price items, the system created distinct contract of the contract type on the account. Now, the system enables you to create plan-specific contract for each price item on the account. You can configure the plan-specific contract creation feature for the fully-insured health care business by setting the following option types in the **C1-ASOBLNG** feature configuration:
 - **Plan ID Characteristic Type** – Used to specify the characteristic type where you want to store the plan for which the contract is created. During the fully-insured policy plan contract creation, this characteristic is defined on the contract. Here, you must specify a characteristic type where the characteristic entity is set to **Contract**.
 - **Plan Based Contract Creation Eligibility** – Used to indicate whether the system should create plan-specific contract for a price item on the account. The valid value is **Yes**.

Alternatively, you can also configure the plan-specific contract creation feature for specific persons (i.e. main customers of the policy) based on the business requirement. This is possible by setting the following option types in the **C1-ASOBLNG** feature configuration:

- **Plan Based Contract Characteristic Type** – Used to specify the characteristic type which helps to determine whether the system should create plan-specific contracts for a price item. This characteristic must be defined on the person for whom you want to create plan-specific contracts on the accounts. Here, you must specify a characteristic type where the characteristic entity is set to **Person**.
- **Plan Based Contract Characteristic Value** – Used to specify the characteristic value which indicates that the system should create plan-specific contracts for a price item on the accounts.
- **Plan ID Characteristic Type** – Used to specify the characteristic type where you want to store the plan for which the contract is created. During the fully-insured policy plan contract creation, this characteristic is defined on the contract. Here, you must specify a characteristic type where the characteristic entity is set to **Contract**.

Charge Type

The following changes are made to the Charge Type feature:

- The **Charge Type** screen is completely redesigned to be in-line with other screens in the application.
- Now, the system enables you to copy a charge type.
- A new field named **Charge Type Sub Category** is added to the **Charge Type** screen. It enables you to specify the sub-category to which the charge type belongs. To implement this requirement, a new custom lookup field named **CHG_TYPE_SUB_CAT** is introduced in this release.

- Through the Charge Type feature, you can define various claim related fees in the application. For example, you can define the **Court Fees** as a charge type where the charge type category is set to **Fees** and charge type sub-category is set to **Claim Handling Cost**.

Self-Funded Pricing

The following changes are made to the Self-Funded Pricing feature:

- The **Claim Pricing Rule** screen is redesigned to introduce the following features:
 - **Additional Fees on Line Items** - The system enables you to specify additional fees which are applicable to one or more charges (i.e. line items) in a claim pricing rule. For example, the insurance company may want to charge court fees on one or more claim charges.

You can define these additional fees as charge types in the system. For each fee (i.e. charge type), the system enables you to define the following rates using a rate type:

- Maximum Fee
- Minimum Fee
- Retained Percentage

Here, you can only use a rate type which is applicable to **Fee**.

- **Minimum and Maximum Markup or Markdown** – The system enables you to specify the minimum and maximum markup or markdown when the markup or markdown type is set to **Percentage**. You can specify the minimum and maximum markup or markdown using a rate type. Here, you can only use a rate type which is applicable to **Markup or Markdown**.
- **Minimum and Maximum Amount for Line Items** – The system enables you to specify the minimum and maximum amount that can be claimed for a charge (i.e. line item). You can specify the minimum and maximum amount using a rate type. Here, you can only use a rate type which is applicable to **Claim Line Item**.

You can specify the above details in the claim pricing rules which are defined at the parent customer and bill group levels.

- The **C1-ExtLookClaimTemplate** extendable lookup is enhanced to support the above listed features. Now, a claim template enables you to specify the following:
 - Additional Fees on Line Items
 - Minimum and Maximum Markup or Markdown
 - Minimum and Maximum Amount for Line Items

The system provides an option to indicate whether the rate specified for a rate type is editable when you use the claim template in a claim pricing rule. Accordingly, you can change the rate for additional fees, markup or markdown, and line items in a claim pricing rule.

- A new extendable lookup for rate type named **C1-ExtLookRateType** is introduced in this release. A rate type extendable lookup enables you to specify the following:
 - Whether the system should calculate fees on sum of all applicable claim charges or separately for each applicable claim charge
 - The billable charge line type using which the calculation line should be created when the fee is calculated on sum of all applicable claim charges
 - Whether the system should calculate percentage based markup or markdown on sum of all eligible claim charges or separately for each eligible claim charge
 - The billable charge line type using which the calculation line should be created when the minimum and maximum markup or markdown is calculated on sum of all eligible claim charges
 - Whether the rate type can be used while adding fees, default markup or markdown, or claim line items

The following rate types are shipped in this release:

- Maximum Fee
- Minimum Fee
- Retained Percentage
- Minimum Markup or Markdown
- Maximum Markup or Markdown
- Minimum Amount
- Maximum Amount
- The **C1-ExtLookPricingRuleLineItem** extendable lookup is redesigned to:
 - Specify a billable charge line type using which the calculation line should be created for a rate type when the system calculates the fees separately for each applicable claim charge
 - Specify a billable charge line type using which the calculation line should be created for a rate type when the system calculates the minimum and maximum markup or markdown separately for each eligible claim charge
 - Specify a billable charge line type using which the calculation line should be created for a rate type when the system calculates the minimum and maximum amount for a line item
- Once you derive the pricing information from a claim pricing rule in a specific stop-loss pricing rule, you need to specify whether the additional fee (if any) is eligible for specific stop-loss. If so, it is considered for calculating specific stop-loss.
- Once you derive the pricing information from a claim pricing rule in an aggregate stop-loss pricing rule, you need to specify whether the additional fee (if any) is eligible for aggregate stop-loss. If so, it is considered for calculating aggregate stop-loss.

- Once you derive the pricing information from a claim pricing rule in a level-funded pricing rule, you need to specify whether the additional fee (if any) should be settled through level funding. If so, it is considered while accumulating level funded charges.
- Until now, when the **Include In Settlement** column was selected corresponding to a line item in a level funded pricing rule, the system settled the charge as well as its markup or markdown through level funding. However, now, the system provides two different options – one which helps to determine whether the charge should be settled through level funding and another which helps to determine whether the corresponding markup or markdown should be settled through level funding.

Trial Billing

The following changes are made to the Trial Billing feature:

- Until now, this feature was available for the financial services domain. Now, you can use this feature for the [Performa billing](#) in the health care domain.
- A new zone named **Policy Details** is added to the **Trial Bill** (Used for Viewing) screen. The **Policy Details** zone enables you to view the details of the policy, plan, and membership for which the trial bill segment is created.

Entity Audit

The following changes are made to the Entity Audit feature:

- A new column named **Pricing Requested** is added to the **Search Audit Event** zone. It indicates whether the repricing entity detail records are created for the audit event. If the column value is **Yes**, you can click and navigate to the **Repricing Request** screen.

User Interface (UI) Level Changes

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

Screen Name (in 2.8.0.0.0)	Changes
Customer 360° View (for the Healthcare domain)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Also Known As column is added in the Search Results section.
Customer 360° Information (for the Healthcare domain)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Person Names section is added in the Person Information zone. • The Trial Bills zone is added in the Customer 360° Information – Account tab. • The Billing section is added in the Account Information zone.
Bill Information	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The View icon is added corresponding to a bill in the Billed Vs Paid zone. On clicking the View icon corresponding to a bill, the Bill Information screen appears where you can view the details of the respective bill. • The Plan/Fee Type column in the Bill Segment Summary and Bill Segment Details zones is renamed to Price Item Description. • The following columns are added to the Bill Segment Details zone: <ul style="list-style-type: none"> ○ Price Item ○ Billable Charge ID ○ Price Item Parameters ○ Plan Information ○ Auto Pay ID ○ Bill Segment ID • The Broadcast icon is added corresponding to each bill segment in the Bill Segment Details zone. • The SQ Details, Bill Segment Calculation Lines, Transaction Details, and Transaction Leg Calculation Lines zones are added to this screen. • On clicking the Broadcast icon corresponding to a bill segment in the Bill Segment Details zone, the SQ Details, Bill Segment Calculation Lines, and Transaction Details zones appear.

Screen Name (in 2.8.0.0.0)	Changes
	<ul style="list-style-type: none"> On clicking the Broadcast icon corresponding to a transaction in the Transaction Details zone, the Transaction Leg Calculation Lines zone appears.
Policy (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Delete button is removed from the Policy zone.
Policy (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Policy Characteristics option is added in the Search By list. The Pending Termination Overridden option is removed from the Status list.
Policy Plan (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Delete button is removed from the Policy Plan zone.
Membership (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Change Coverage and Cancelled options are removed from the Status list. The Inactive option is added in the Status list. The Plan Number field is removed and instead the Plan ID field is added when you search for a membership using the policy plan details. The Membership ID, External Membership ID, Characteristic Type, and Characteristic Value fields are added when you search for a membership using the membership details. The Relationship Type field is added when you search for a membership using the member person details.
Membership (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Delete button is removed from the Membership zone. The Inactive button is added in the Membership zone. The Billable Charges, Bill Segment Details, Billable Charge Timeline Details, and Pricing Calculation Details zones are added in the Membership - Contracts and Charges tab.
Trial Bill (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Policy Details zone is added to this screen.
Audit Event (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> By default, the Entity Details option is selected in the Search By list. The Entity and Entity ID fields are added and the Entity Business Object field is removed from the Search Criteria section when you are searching for an audit event using the entity details.

Screen Name (in 2.8.0.0.0)	Changes
	<ul style="list-style-type: none"> • The From Effective Date and To Effective Date fields are added in the Search Criteria section when you are searching for an audit event using the entity or audit event details. • The Audit Event Type field is added in the Search Criteria section when you are searching for an audit event using the audit event details. • The Entity ID, Entity, Effective Date, and Pricing Requested columns are added in the Search Results section. • The Maintenance Object column is removed from the Search Results section.
Audit Event (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Entity ID field is added to the Audit Event zone.
Inbound Message (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Person ID field is added and the Person Name, Person Identifier Type, and Person Identifier fields are removed from the Search Criteria section when you are searching for an inbound message using the person details.
View Billed Transactions	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The screen is renamed to Bill Drill Down Details. • The Search Bill zone is renamed to Search Billing Element. • The Search By field is added to the Search Billing Element zone. • The Bill Status column in the Search Billing Element zone is renamed to Status. • The Bill Segment Calculation Lines, Timeline and Billable Charge Details, Pricing Calculation Details, and Transaction Leg Calculation Lines zones are added to this screen.
Person	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Customer Segment, Customer Tier, and Relationship Manager fields are added to the Main tab.
Customer 360° Information (for the Financial Services domain)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Deal Information section is removed from the Person Information zone.
Price Item (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Price Item Manager To Do Type, Price Item Manager To Do Role, Floor and Ceiling Type fields are added to the Price Item zone. • The Division-Specific Hierarchy for Price Item, Division-Specific Cost for Price Item, and Division-Specific Floor and Ceil Values for Price Item zones are added to this screen.

Screen Name (in 2.8.0.0.0)	Changes
Price Item (Used for Adding and Editing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Price Item Manager To Do Type, Price Item Manager To Do Role, Floor and Ceiling Type fields are added in the Main section. • The Entity Hierarchy, Costs, and Floor and Ceiling Type columns are added in the Divisions section. • On clicking the Add icon in the Entity Hierarchy column, a grid with the following columns appear in the screen: <ul style="list-style-type: none"> ○ Hierarchy ○ Parent Entity ○ Start Date ○ End Date • On clicking the Add icon in the Costs column, a grid with the following columns appear in the screen: <ul style="list-style-type: none"> ○ Effective Date ○ Cost Type ○ Cost Value ○ Cost Currency • On clicking the Add icon in the Floor and Ceiling Type column, a grid with the following columns appear in the screen: <ul style="list-style-type: none"> ○ To Do Role ○ Floor Value ○ Ceil Value ○ Floor and Ceil Currency
Charge Type	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Charge Types zone is renamed to Charge Type List. • The Category column in the Charge Type List zone is renamed to Charge Type Category. • The Charge Type Sub Category and Duplicate columns are added to the Charge Type List zone. • The Broadcast icon is added corresponding to each charge type in the Charge Type List zone. • The Charge Type zone is added to this screen.
Charge Type (Used for Adding and Editing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Category field is renamed to Charge Type Category. • The Charge Type Sub Category field is added to this screen.

Screen Name (in 2.8.0.0.0)	Changes
Line Item Extendable Lookup (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Default Markup or Markdown Values, Additional Information, and Billable Charge Line Type for Fee Type sections are added to the Extendable Lookup Value zone.
Line Item Extendable Lookup (Used for Adding and Editing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Default Markup or Markdown Values, Additional Information, and Billable Charge Line Type for Fee Type sections are added to this screen.
Claim Template Extendable Lookup (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Additional Fees section is added to the Extendable Lookup Value zone. • A grid with the following columns is added to the Default Markup or Markdown Values section: <ul style="list-style-type: none"> ○ Editable ○ Rate Type ○ Rate Value • The Post Processing Applicable and Rate columns are added to the Line Items section. • A grid with the following columns is added to the Rate column: <ul style="list-style-type: none"> ○ Editable ○ Rate Type ○ Rate Value
Claim Template Extendable Lookup (Used for Adding and Editing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Additional Fees section is added to this screen. • A grid with the following columns is added to the Default Markup or Markdown Values section: <ul style="list-style-type: none"> ○ Editable ○ Rate Type ○ Rate Value • The Post Processing Applicable and Rate columns are added to the Line Items section. • A grid with the following columns is added to the Rate column: <ul style="list-style-type: none"> ○ Editable ○ Rate Type ○ Rate Value

Screen Name (in 2.8.0.0.0)	Changes
Claim Pricing Rule (for Parent Customer and Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Additional Fees section is added to this screen. It appears on selecting the claim template from the respective list. • A grid with the following columns is added to the Markup or Markdown Values section: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value • The Rate column is added to the Line Items section. It contains a grid with the following columns: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value
Specific Stop-Loss Pricing Rule (for Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Additional Fees section appears in the Pricing Information for rule type category : Claim section when you derive the pricing information from a claim pricing rule. • A grid with the following columns is added to the Markup or Markdown Values section: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value • The Rate column is added to the Line Items section. It contains a grid with the following columns: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value
Aggregate Stop-Loss Pricing Rule (for Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Additional Fees section appears in the Pricing Information for rule type category : Claim section when you derive the pricing information from a claim pricing rule. • A grid with the following columns is added to the Markup or Markdown Values section: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value • The Rate column is added to the Line Items section. It contains a grid with the following columns: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value

Screen Name (in 2.8.0.0.0)	Changes
Level Funded (LF) Pricing Rule (for Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Additional Fees section appears in the Pricing Information for rule type category : Claim section when you derive the pricing information from a claim pricing rule. • A grid with the following columns is added to the Markup or Markdown Values section: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value • The Rate column is added to the Line Items section. It contains a grid with the following columns: <ul style="list-style-type: none"> ○ Rate Type ○ Rate Value • The Markup / Markdown Included In Settlement? column is added to the Line Items section.
Level Funded (LF) Pricing Rule (for Parent Customer)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Active/Runout Flag field is added in the Main section. • The Settlement Rules section is added to this screen.
Level Funded (LF) Pricing Rule Type	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The following fields are added to the Level Funded – Specific Additional Data section: <ul style="list-style-type: none"> ○ Terminal Liability Reserve (Run Out) Funding Required ○ Claim Fund Off-Process Request Type ○ Run Out Fund Off-Process Request Type ○ Run Out Fund Pricing Rule Type ○ Run Out Fund Price Item ○ Run Out Billable Charge Line Type ○ Run Out Surplus Billable Charge Line Type ○ Run Out Deficit Billable Charge Line Type • The Settlement Rules section is added to this screen.
Construct (Used for Adding, Editing, and Copying)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Template Selection Algorithm field is added to the Main section.
Construct (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Template Selection Algorithm field is added to the Main section of the Construct Information zone.

Database Level Changes

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) which are newly added in Oracle Revenue Management and Billing Version 2.9.0.0.0, refer to the Appendix A : New Objects in the Oracle Revenue Management and Billing V2.9.0.0.0 Database 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 2.9.0.0.0 is supported:

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
Windows 10 (64-bit) with Internet Explorer 11.x ¹ or Google Chrome Enterprise Version 67 or higher	AIX 7.2 TL0+ ² (64-bit)	POWER 64-bit	WebLogic 12.2.1.3 (64-bit)	Oracle Database Server 18c (12.2.0.2) SP1+ Oracle Database Server 19c
	Oracle Linux 7.x ¹ (64-bit)	x86_64	WebLogic 12.2.1.3 (64-bit)	Oracle Database Server 18c (12.2.0.2) SP1+
			IBM WebSphere 9.0.5.2	Oracle Database Server 19c
	Oracle Solaris 11.3+ ²	SPARC 64-bit	WebLogic 12.2.1.3 (64-bit)	Oracle Database Server 18c (12.2.0.2) SP1+ Oracle Database Server 19c
	Red Hat Enterprise Linux ³ 7.x ¹ (64-bit)	x86_64	WebLogic 12.2.1.3 (64-bit)	Oracle Database Server 18c (12.2.0.2) SP1+
			IBM WebSphere 9.0.5.2	Oracle Database Server 19c
Windows Server 2012 R2 (64-bit)	x86_64	WebLogic 12.2.1.3 (64-bit)	Oracle Database Server 18c (12.2.0.2) SP1+ Oracle Database Server 19c	

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 Here, **x** represents the vendor supported version.

² Version numbers suffixed with "+" are the MINIMUM version supported. That version and all future 4th digit updates will be supported.

³ Oracle Revenue Management and Billing is tested and certified on Oracle Linux 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.

Oracle Utilities Application Framework 4.4.0.0.0 Enhancements

The following enhancements are made in Oracle Utilities Application Framework Version 4.4.0.0.0:

- System Wide Enhancements
- To Do Enhancements
- External Messages Enhancements
- Miscellaneous Enhancements

System Wide Enhancements

New Style Sheets

This release has introduced new style sheet to provide a more modern look.

Detailed description and value (required):

The system's style sheet has been updated to incorporate a more modern color palette, spacing and icons.

Besides the general changes, the following more specific changes may be noticed:

- The Search Menu widget, used to search for a page in the system that is found on a menu has been moved to be to the right of the Admin menu icon (for left to right languages).
- The Expand and Collapse icons for zones and sections have been stylized and moved to the right side of the zone (for left to right languages)
- Various icons throughout the system have changes, including Zone level icons.
- In some cases, the context menu has been moved to the right of the information string instead of the left.
- Labels on maintenance pages and query pages are in ALL CAPS instead of title case.

Marking a Filter Value in Error

Enhanced support for marking fields in error on queries.

Detailed description and value (required):

In this release, the system has enhanced error handling for fixed page searches and zone based queries to correctly mark the field that has an error.

- For fixed page searches, if the field name of the field to mark is populated in the server message, the system will mark that field. If no field name is provided, the system will mark the first filter value in that section.
- For zones that have filters and a filter validation script, the system will mark the filter field in error based on the element referenced in the 'terminate with error' statement in the validation script.

To Do Enhancements

The following described enhancements to To Do processing.

To Do Pre-creation Algorithm on To Do Type

A new plug-in spot for To Do pre-creation on To Do Type has been added.

Detailed description and value (required):

The system already supports a To Do pre-creation plug-in spot on Installation Options. Plug-ins in this plug-in spot are called for every To Do type in the system. In this release an analogous plug-in spot has been added on To Do Type. This allows for implementations to include To Do pre-creation logic that is specific for a To Do type.

The following describes more information about this feature:

- Algorithms for the new plug-in spot may be used to add or update characteristics for the new To Do entry. It is envisioned that implementations can use this capability to link specific related information for every To Do entry. This extra information can help users manage their To Dos using the new To Do Management portal. In addition, this captured information can be used in the Calculate Priority algorithm to automatically adjust the priority for a new To Do Entry.
- Algorithms for the new plug-in spot may be used to indicate that the To Do Entry should be suppressed. This allows for more granular conditions to be checked prior to see if the To Do entry is not needed / applicable.
- If at least one To Do pre-creation algorithm is plugged in on the To Do Type, only those algorithms are called. The Installation Option algorithms will not be called. However, the product has provided a To Do Type pre-creation algorithm that executes the installation option To Do pre-creation algorithms. This allows for implementations to control if the installation algorithms are also relevant and if so, when they should be executed.

To Do Management Portal

A new portal to help implementations review and managed To Do Entries has been provided.

Detailed description and value (required):

In this release a new portal and query zone have been provided to help assignment and management of non-completed To Do Entries. This new portal - To Do Management - provides many options that improve on the functionality of the existing pages for assigning and managing non-completed To Do entries, including To Do Search, To Do List and To Do Supervisor Assignment.

The following points highlight the features of the new To Do Management portal:

- It is provided for both supervisors and non-supervisor To Do users. As with existing To Do pages, a supervisor is determined via security access.
- The query zone requires a To Do Type. Only the To Do Types appropriate for the current user are shown.

- Many filters have been provided to help users to narrow down the list of To Do entries to view based on specific requirements. Besides common filters like the assigned user or role and the priority, the zone also provides the ability to filter by a Sort Key value, by the Message linked to the To Do and by up to five Characteristic Type and Value pairs.
- Instead of provide a date range for the filter, the zone provides a 'days' range. This is because more often users are looking for To Dos that are a specific age or in a range of ages.
- The Characteristic Type filter dropdown first checks to see if the To Do Type configures To Do Characteristics and if so, it only shows those characteristic types. If the To Do type does not have such configuration, the dropdown shows all valid characteristic types for the To Do Entry characteristic entity.
- The zone does not use pagination. It is bringing up to 400 To Do entries using the input filter criteria.
- The zone supports column configuration, allowing each user to choose the columns displayed and the order. Using this technique, users can use the Save Search functionality to save different searches for different To Do Types and different search requirements.
- The search results includes the following:
 - Display of the information string of the related object (drill key) of the To Do entry.
 - Ability to put the list of results into the Worklist zone.
 - Besides the creation date and time, there is also a column for the age of the To Do entry ('days old'), for users that prefer seeing the information in that format.
 - Separate columns for the first 5 sort keys (with sort key type / value listed) allowing the user to sort by any of the values.
 - A single column showing all the characteristics for the To Do listing each type and value.
 - The count of related To Do entries. As with other pages, clicking the link brings the user to the To Do Search.
 - If comments or a user log exists, the standard icon is visible but clicking the icon displays the information. This is different from other existing To Do query pages, which take the user to the To Do entry maintenance page to view the information.
- Several mass actions are provided. For one or more selected To Do entries, a user can assign, un-assign, complete, update the priority or add a user log entry. Note that the new portal follows existing business rules. For example, if a To Do is assigned to a user, only that user can update its priority.

More Granular Security on Current To Do Zone

The Complete All button on the Current To Do zone has its own application service access mode.

Detailed description and value (required):

In previous releases, if a user had security for the Complete access mode on the Current To Do dashboard zone, both the Complete and Complete All (to complete related To Do entries also) would be available. In this release an additional access mode for Complete All has been introduced, allowing for implementations to separately secure which users are allowed to complete a group of related To Do entries from the users allowed to complete a single To Do entry being worked on.

External Messages Enhancements

Support URI Substitution for WSDL Link for SOAP Services

For cloud installations the base WSDL URI is different than the application server URI and must be configured.

Detailed description and value (required):

In this release the system supports a new URI substitution variable for the WSDL URL: F1_BASE_IWS_URI. This will be configured for cloud implementations. For on-premise installation, no configuration is necessary.

Support URI Substitution for External Links to the Application

For cloud installations the environment URL used to launch the application server from an external link must be configured.

Detailed description and value (required):

In this release the system supports a new URI substitution variable for defining the base URI for launching the system from an external link: F1_BASE_WEB_URI. This will be configured for cloud implementations. For on-premise installation, no configuration is necessary. The business service F1-RetrieveEnvironmentURL (Retrieve Environment URL) has been updated accordingly.

Miscellaneous Enhancements

Menu Name Visible in Search Menu Results in Debug Mode

When logging into the system in Debug mode, the name of the parent menu where a menu item is found is displayed in parentheses when using the Search Menu function.

Detailed description and value (required):

To help ensure that menu items are designed with unique names to facilitate searching, the parent menu name is displayed when using the Search Menu function in debug mode.

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 2.8.0.0.0 to 2.9.0.0.0. For more information on how to upgrade, refer to the following documents which are available on OTN:

- Oracle Revenue Management and Billing Version 2.9.0.0.0 Upgrade Guide
- Oracle Revenue Management and Billing Version 2.9.0.0.0 Upgrade Path Guide

For upgrading from any other version of Oracle Revenue Management and Billing other than 2.9.0.0.0, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.

Unsupported Integrations

We are not supporting Oracle Documaker Integration with ORMB Version 2.9.0.0.0. Alternatively, you can configure the bill and letter reporting feature so that you can generate bills and letters of a customer in the PDF format from ORMB. For more information about the reporting feature, see the following documents which are available on OTN:

- *Oracle Revenue Management and Billing Reporting User Guide*
- *Oracle Revenue Management and Billing Reporting Installation Guide*
- *Oracle Revenue Management and Billing Bill and Letter Reports Configuration Guide*
- *Oracle Revenue Management and Billing Reporting SDK Guide*

Deprecation Notices for ORMB Version 2.9.0.0.0

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:

- Deprecated Functionality in This Release
- Deprecation Planned for Future Releases

Deprecated Functionality in This Release

The following feature is deprecated in Oracle Revenue Management and Billing Version 2.9.0.0.0:

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

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.
- **Accrual Based on TFM Data** – The accruals created for an account using an accrual type where the accrual criteria is set to **Actual** and accrual source is set to **Transaction Feed** are no longer supported. In the next release, we will deprecate the **Transaction Feed** accrual source and you will not be able to create accrual based on TFM data. Therefore, we recommend you to create accruals either based on actual trial bill or historical data.
- **Inbound Messages** – The following inbound messages for the fully insured and administrative services only (ASO) business will not be supported from the next release:
 - Customer Inbound Message
 - Membership Inbound Message

- ASO Customer Inbound Message

We recommend you to use the Healthcare Inbound Message instead of the above mentioned inbound messages. This is because, henceforth, all entities such as person, account, policy, and policy plan should be created through a customer registration object.

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
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				
Batch Control	GLASSIGN, C1-IAENT, C1-DARSU				
View	CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW				
Business Service	<p>C1-EffectivePricing, C1_PriceParmBS</p> <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>				
Service Program	EFFPRCSERVICE, C1_PRICEPARM				
Column	ADDRESS1 , ADDRESS2 , ADDRESS3, ADDRESS4 , CITY, NUM1, NUM2, COUNTY, POSTAL, HOUSE_TYPE, GEO_CODE, IN_CITY_LIMIT, STATE, and COUNTRY from the CI_PER table				
Table	CI_PER_ADDR_SEAS				
Screen	Rate Check, Policy (P&C), Insurance Control Central, Collection Control Central, Account Current, Device Test Component Type, Device Test Type, Field Activity Type, Field Activity Type Profile, Field Service Class, Field Service Control, High Low Factor, MDT, MDT Type, Meter ID Type, Meter Location, Meter Read Instruction, Meter Read Warning, Meter Reader Remark, Meter Source, Meter Type, Variance Parameter				

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 2.9.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 2.9.0.0.0 and Oracle Insurance Revenue Management and Billing Version 2.9.0.0.0 media packs can be installed on the following supported platforms:

- AIX (64-bit)
- Microsoft Windows (64-bit)
- Linux (64-bit)
- Oracle 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 2.9.0.0.0 Quick Installation Guide*.

To download a package from a media pack:

1. Login to [Oracle Software Delivery Cloud](#).
2. Select the **Release** option from the **All Categories** list.
3. Type **Oracle Financial Services Revenue Management and Billing** or **Oracle Insurance Revenue Management and Billing** in the corresponding text box.
4. Click **Search**. A list of media packs appears in the search results.
5. Click **Add to Cart** corresponding to the **Oracle Financial Services Revenue Management and Billing 2.9.0.0.0** or **Oracle Insurance Revenue Management and Billing 2.9.0.0.0** option.
6. If required, you can verify the media pack which is added to the cart by clicking the **View Cart** link.
7. Click the **Checkout** link. A page appears.
8. Select the required platform from the **Platforms/Languages** list.
9. Click **Continue**. A page appears with the license agreement.
10. Scroll and read the full license agreement and then click the **I reviewed and accept the Oracle License Agreement** option.
11. Click **Continue**. The **File Download** page appears.
12. Select the required package that you want to download from the media pack and then click **Download**. The **View Downloads** window appears.
13. Select the **Save as** option from the **Save** list corresponding to the download you want to save. The **Save As** dialog box appears.
14. 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
31021921	30963119	INVALID STATUS FOR THE CURRENCY HAVING DECIMAL POSITIONS DEFINED AS '0'
31021911	30702692	VGBP - UI MAP FEATURE OF ERROR AUTOMATION IS NOT WORKING
31021891	30926108	TOTAL_CR_AMT INCORRECT IN C1_FUNDING_REQ AFTER DOING OFFSET OF NON-USD BILLS
31016707	30894892	DUPLICATE ROWS RETURNED FOR PERSON ID SEARCH IN HOLD REQUEST UI
30999563	30776486	PERFORMANCE ISSUE IN HOLD REQUEST UI
30999549	30805704	TOTAL_CR_AMT INCORRECT IN C1_FUNDING_REQ
30999538	30566161	UIS ARE TAKING TOO MUCH TIME TO GET LOADED FULLY
30677324	30238038	BILL LEVEL MAPPING SOURCE SYSTEM ISSUE.
30610163	30507697	BILLABLE CHARGES ARE NOT GETTING CANCELLED WHEN A MEMBERSHIP IS TERMINATED ON MEMBERSHIP START DATE
30597158	30452817	CLAIMS PRICING RULE CANNOT BE SEEN ON BILLING GROUP SSL EFFECTIVE CLAIM PRICING RULE
30596724	30344866	CRITERIA SECTION NOT DISPLAYED PROPERLY IN COMPARISON:NEW VERSUS EXISTING SCREEN
30596696	30331776	FILE REQUEST TYPE ENHANCEMENT
30588173	29963832	PERFORMANCE ISSUE SEARCHING BILL USING PERSON ID
30588112	29641196	APPROVAL TXN SHOULD NOT GET CREATED FOR PRODUCT PRICING IN DRAFT STATUS
30587670	30124204	BILL SEGMENT AMOUNT AND BILL AMOUNT NOT MATCHING
30585849	30582696	ACCOUNT CHARACTERISTICS NOT DISPLAYING MULTIPLE VALUES
30550967	30470969	ELIMINATE THE PARAMETER RESET FUNCTION
30535663	30498035	ERROR ENCOUNTERED WHEN SENDING MULTIPLE PERSON IDENTIFIERS USING THE HEALTHCARE INBOUND MESSAGE
30502530	30474660	VGBP - INCONSISTENT BEHAVIOR ON PRICEITEM BO ALGORITHM
30497878	30482827	UNABLE TO UPDATE POLICY ADHOC CHARACTERISTIC - NO SUCH NODE NAMED OF TYPE FIELD
30495834	30492022	ONE DAY TIMELINE CREATED FOR TIER BASED PRICING RULE - C1-REPC2
30483220	30237550	PREMIUM BILLABLE CHARGES CREATED WITH INCORRECT CONTRACT WHEN MULTIPLE CONTRACTS

Bug Number	Copy of (Base Bug)	Description
30469957	30323330	INCORRECT AUDIT EVENTS GETTING CREATED
30469952	30323290	INCORRECT BILL SEGMENTS GETTING CANCELLED WHEN MEMBERSHIP GETS TERMINATED RETROACTIVELY
30469948	30274075	OVERLAPPING TIER BASED ERROR EVEN IF THE EXISTING PRICING RULE IS 'INACTIVE'
30469911	30379957	INCORRECT BILL DUE DATE IS CALCULATED WHEN FREEZE AND COMPLETE ARE SAME BUTTON
30469903	30239803	INCORRECT BILL DUE DATE FOR ACTIVE GROUPS
30461354	30250035	EDIT, HOLD, OFFSET BUTTONS NOT VISIBLE ON SELECTED BILLS ZONE FOR AUTOMATIC FR
30461338	30301269	C1-ODFU BATCH CREATING ONLY 5 LINE ITEMS EVEN AFTER PROVIDING 9 LINE ITEM
30461327	30397720	INCORRECT REFUND AMOUNT IS BEING STAMPED IN THE REFUND REQUEST
30460759	30174889	EXECUTION OF BATCH C1-AUDEV AND C1-FIBCR IN MULTITHREADING MODE (X NBR OF THREAD COUNT)
30460319	30324840	THERE IS NO COBOL WRAPPER CLASS FOR ALGORITHM SPOT 'APAM'
30460308	30304250	APAY_UPL_NOC_LOOKUP LOOKUP VALUE [C01] SET TO "INACTIVE"
30460150	30311581	TRIAL BILLING BATCH IS IN ERROR WHEN NO BILL CYCLE PARAMETER VALUE POPULATED.
30451728	30323290	INCORRECT BILL SEGMENTS GETTING CANCELLED WHEN MEMBERSHIP GETS TERMINATED RETROACTIVELY
30449865	30354363	USAGE ACCOUNT LINK ON BILL SEGMENT PAGE IS NAVIGATING TO INVOICE ACCOUNT.
30407085		MISSING COUNTY FIELD IN HEALTHCARE INBOUND MESSAGE
30406741	29744556	NOT ABLE TO SEARCH TRANSACTIONS IN TRANSACTIONS DETAILS SCREEN WHEN ACCT_NBR DOESNOT EXISTS IN ORMB
30406244	29582736	CHARGE TYPE CHARACTERISTIC- NOT ABLE TO VIEW CHAR VALUES IN DROP DOWN, CAN SEE ONLY CHARACTERISTIC T
30405062	30125704	HOLD ENTITIES SECTION IN HOLD REQUEST RETURNS ZERO RESULT
30391131	30125704	BUG 30125704 - HOLD ENTITIES SECTION IN HOLD REQUEST RETURNS ZERO RESULT
30220481	30174852	PREMIUM CALCULATION FAILS FOR ONE DAY COVERAGE
30220470	30174748	AUDIT ALGO (BO- MEMBERSHIP , PERSON) ISSUES - UPDATING PERSON CHAR FOR AUDIT EVENT IS THROWING A SYSTEM ERROR
30084137	30071442	FORWARD PORT BUG 30071442 - ISSUE IN FIXED POSITION FILE REQUEST TYPE
30059362	29754293	HCSC.ORMB.AJUSTMENT APPROVAL PROFILE WRONG TODO ROLE FLOW

Bug Number	Copy of (Base Bug)	Description
<u>30055732</u>	<u>29549720</u>	TRANSACTION HAVING DETAILS ABOUT TWO ACCOUNTS BELONGING TO TWO DIFFERENT DIVISIONS CANNOT BE SPLIT
<u>30051050</u>	<u>30004926</u>	BILL LEVEL EXACT MATCH LOGIC IS FAILING FOR BILLLEVEL DERIVATION PARMS WITH DIFFERENT PAST DATES AND OVERLAPPING DATES FOR SOME SCENARIO
<u>29899502</u>	<u>29753017</u>	FORWARD PORT: BUG 29666464 - SCHEDULER CHAIN SCREEN ISSUES.
<u>29746240</u>	<u>29506999</u>	NULL POINTER ERROR IN C1-FTRAN WHEN VERSIONNUM FIELD MISSING FOR TEMPLATE
<u>29588689</u>	<u>27914883</u>	CUSTOMER CLASS-BILL PREPROCESSING ALGO NOT INVOKED VIA INVOICE CONSTRUCT BILLING
<u>30586880</u>	<u>30364578</u>	TRANSACTION RECORD TYPE UI IS NOT DISPLAYING RECORDS CORRECTLY.
<u>30509953</u>		START AND STOP SCREEN IS ALSO SHOWING PREMISE AND LOCATION OPTION WHERE ONLY CONTRACT IS REQUIRED.
<u>29830962</u>	<u>29655342</u>	ENH REQ: PRICE ITEM RELATIONSHIP UI SHOULD ALLOW USER TO SELECT ALL AVAILABLE PARAMETERS

Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 2.9.0.0.0 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 (0.000000000000000001/0.0000000000000000011/0.0000000000000000023) 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-PDTXN) 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	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, 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, rate schedule details after modification are 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	ERROR OCCURS ON USING A VALUE WITH HYPHEN FOR A CHARACTERISTIC TYPE
Description	At present, an error occurs on a screen where a characteristic value with hyphen (-) 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

Issue	CUSTOMER SIMULATION NOT WORKING FOR CUSTOMER HAVING LARGE DATA
Description	If a customer has large number of accounts in its hierarchy or if there are large number of billable charges for distinct price items, the corresponding prospect hierarchy will not be created successfully when you create a deal for the customer using the simulation type as Customer .
Workaround	Create a deal for such customers using the simulation type as Deal

Issue	INCORRECT AVG PRICE AND COST CALCULATION WHEN VOLUME/COMMITMENT HAVE MULTIPLE SQIS
Description	The system calculates the average price and cost incorrectly when there are multiple SQIs in the SQI-based billable charges.
Workaround	None

Issue	VIEW PRICING SCREEN :- PRICE ITEM IS NOT SEARCHING USING PRICE ITEM FILTER OPTION
Description	The Price Item field is not working while filtering data in the Pricing and Commitment Details screen.
Workaround	None

Issue	VIEW PRICING SCREEN (PERFORMANCE ISSUES) :- IT IS TAKING SO MUCH TIME TO OPEN THE SCREEN EVEN IF I WILL CHANGE ANY RATE OR COMMITMENT AND BACK ON VIEW PRICING SCREEN TAKING SO MUCH TIME
Description	The Pricing and Commitment Details screen takes time to reload when you change the proposed rate or commitments.
Workaround	None

Issue	HIERARCHY UI-APPROVED PRICE ITEMS GETTING UNAPPROVED AGAIN IF RM CHANGES THE PRICING AND DOES THE SIMULATION AGAIN
Description	If an approver request the submitter to resubmit the deal for approval and if the submitter makes any changes in the pricing for a price item, the system should only change the status of the price item to Pending for Approval while simulating the deal. But, the system changes the status of all price items in the deal to Pending for Approval .
Workaround	None

Issue	DEAL SIMULATION NOT WORKING FOR PASSTHROUGH,RECURRING CHARGES AS WELL STACKING AND CUSTOM AGGREGATE SCHEDULE
Description	The Deal Modelling and Simulation feature does not consider pass-through billable charges, recurring charges, stacking, and custom aggregate schedule while deriving proposed commitments.
Workaround	None

Issue	DEAL END DATE IS NOT CONSIDERED FOR PRICE ASSIGNMENT PRICELIST ASSIGNMENT AND PRODUCT ENROLLMENT
Description	In the Apply Back feature, the system does not use the deal end date while creating price assignments, price list assignments, and product enrollments.
Workaround	None

Issue	SAME ORASEARCH ZONE APPEARS FOR MULTIPLE BIND VARIABLES WHILE DEFINING CONSTRUCT
Description	If a template has multiple bind variables and zone is specified for two or more bind variables, the system displays the same OraSearch window for all bind variables when you define a criteria in a construct. It shows the OraSearch zone of the bind variable which is added first in the template.
Workaround	None

Issue	INCONSISTENT DATA LENGTH FOR SRCH_CHAR_VAL AND ADHOC_CHAR_VAL
Description	At present, the ADHOC_CHAR_VAL and SRCH_CHAR_VAL columns have different column length. The SRCH_CHAR_VAL column can only store 50 characters. Therefore, an adhoc characteristic value above 50 characters is truncated and then stored in the SRCH_CHAR_VAL column. As a result, erroneous results appear when you search for an entity using a string from an adhoc characteristic value which is beyond 50 characters.
Workaround	None

Issue	ORASEARCH ICON FOR FK REF CHAR TYPE IS DISABLED IN AWB SCREENS
Description	At present, the Search icon in the Characteristic Value column is disabled when you select a foreign key value characteristic type in the screens which are designed using the Application Workbench (AWB).
Workaround	None

Issue	REST SERVICES DO NOT WORK ON WEBSHERE
Description	At present, calls to RESTful web service do not work as expected on the WebSphere application server.
Workaround	Use Inbound Web Service (IWS)

Insurance

Issue	OLD INSURANCE FEATURES ARE NOT TESTED AND VERIFIED IN ORMB VERSION 2.9.0.0.0
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

Issue	UNABLE TO SELECT AUDIT EVENT TYPE IN PRT WHEN UPDATE ALL IS CONFIGURED IN AET
Description	At present, you cannot use an audit event type of the C1-Membership and C1_PERSON_BO business objects in the Age Based and Tier Based pricing rule types when the Update All option is selected in the audit event type.
Workaround	Therefore, we recommend you to select an audit event type of the C1-Membership and C1_PERSON_BO business objects where the Update All option is not selected.

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	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.