

# **Oracle® Revenue Management and Billing**

Version 3.2.0.0.0

## **Release Notes**

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## About this Document

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

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

Document Name	Description
<i>Oracle Revenue Management and Billing Licensing Guide</i>	<p>Lists different features which you can use when you acquire a license for the following products:</p> <ul style="list-style-type: none"> <li>• Oracle Financial Services Revenue Management and Billing</li> <li>• Oracle Insurance Revenue Management and Billing</li> </ul> <p>It also provides the licensing information about the third party JARs and components which are included in the above mentioned products.</p>
<i>Oracle Revenue Management and Billing Quick Installation Guide</i>	<p>Provides information about the media packs which are available for the current release. It contains information about the supported platforms, space requirements, and release-specific documentation library. In addition, it contains high-level information on how to install ORMB and selected additional software.</p>
<i>Oracle Revenue Management and Billing Installation Guide</i>	<p>Provides an overview about the application architecture. It contains detailed information about the software and hardware requirements, supported platforms, application server and database space requirements, and application server pre-requisites for supported platforms. It explains the installation and configuration menu options which are available during installation and advanced menu options which are available post installation. It also explains how to configure WebSphere application server and how to install OUAF, OUAF rollup packs, ORMB, and ORMB patches or rollup packs.</p> <p>It contains appendices which lists ORMB rollup packs and notices about third party JAR and other components.</p>

Document Name	Description
<i>Oracle Revenue Management and Billing Database Administrator's Guide</i>	<p>Provides information about the supported database platforms and explains how to install database with or without demo data. It contains the standards and conventions that should be followed while working with ORMB database. In addition, it lists various configurations and implementation guidelines with respect to tablespace, encryption, storage, compression, indexes, initialization parameters, listener, table partitioning, performance monitoring, memory resource management, optimizer statistics and segment advisors, etc.</p> <p>It contains various appendices which lists the new objects added in ORMB, application services configured for default user groups, new objects added in OUA, information about OUA system tables and ORMB rollup packs, notices about third party JAR and other components.</p>
<i>Oracle Revenue Management and Billing Security Guide</i>	<p>Highlights what's new in security! Describes all the security features available in ORMB for authentication, authorization, user access, database access, LDAP and SSO integration, audit, encryption, web services, and JNDI access. It also describes how to provide support for data masking, Oracle cloud object storage, groovy, HTTP proxy, keystore, truststore, whitelist, federated architecture, and object erasure. In addition, it explains how to garble the customer information.</p>
<i>Oracle Revenue Management and Billing Server Administration Guide</i>	<p>Provides detailed information about the product architecture, native support, directory structures, environment variables, logs, etc. It explains various concepts related to the batch server and lists and describes the scripts required for installing and configuring ORMB. It explains how to monitor the system and configure Web browser, Web application server, business application server, inbound web services, and batch server. It explains how to provide Oracle Cloud Support and how to integrate and monitor Oracle Scheduler.</p> <p>It contains various appendices which lists and describes the parameters available in the ENVIRON.INI, Web.xml, spl.properties, hibernate.properties, submitbatch.properties, threadpoolworker, coherence-cache.config.xml, and tangosol-coherence-override.xml files.</p>
<i>Oracle Utilities Application Framework Business Process Guide</i>	<p>Explains how to get acquainted with the user interface. It explains the different types of pages or portals that you may come across in the application. It explains how to set the user preferences and how to create, manage, assign, and complete a To Do in the application. It also explains how to submit reports and view historic reports in the application.</p>

Document Name	Description
<i>Oracle Utilities Application Framework Administrative Guide</i>	Explains the general, security, user, designing, developing, and scripting options available in Oracle Utilities Application Framework (OUAF). It describes the user interface, database, configuration, and reporting tools available in OUAF. In addition, it provides information about the application viewer, how to configure incoming and outgoing messages, and how to integrate Lightweight Directory Access Protocol (LDAP), Oracle Identity Manager (OIM), and Batch Scheduler with Oracle Revenue Management and Billing (ORMB).
<i>Oracle Revenue Management and Billing Business Process Guide</i>	Explains how to maintain the demographic, geographic, and financial objects (i.e. accounts) of a customer. It explains how to manage a customer's bills, payments, adjustments, credits, collections processing, statements and deposits in Oracle Revenue Management and Billing (ORMB). It also describes the financial transactions, case management, sales and marketing functions, rates engine, quotations, loans, how to monitor and execute job streams, and how to manage workflows, notifications and overdue processing. In addition, it explains how to extract the data from the system using an extract template.  The features listed and described in this document can be used in both financial services and health insurance domains.
<i>Oracle Revenue Management and Billing Administrative Guide</i>	Explains how to configure various features and functionalities in Oracle Revenue Management and Billing (ORMB). For example, billing, payments, adjustments, financial transactions, credits, collections processing, loans, service credits, background processes, quotations, case management, security, overdue processing, batch scheduler, workflow and notifications, etc.  The information available in this document can be used in both financial services and health insurance domains.
<i>Oracle Revenue Management and Billing Banking User Guide</i>	Describes various features which are available for the financial services business. For example, customer registration, customer 360° view, invoicing group, pricing management, multi-currency accounts, currency conversion, construct based billing and settlement, trial billing, product lifecycle management, subscription billing, mass pricing update, accrual, foreign exchange gain loss, transaction feed management, upload validated payment and adjustment data, freeze payments on notification, payment request, offset request, funding request, hold request, refund/write off request, dispute request, upload request, earnings credit rate, payment agreement request, invoice request, deal management, etc.  It describes all screens related to these features and explains how to perform various tasks related to the feature in the application.

Document Name	Description
<i>Oracle Revenue Management and Billing Insurance User Guide</i>	<p>Describes various features which are available for the following three lines of health insurance business – fully-insured group, self-funded, and individual. For example, customer registration, customer 360° view, pricing management, trial billing, transaction feed management, upload validated payment and adjustment data, freeze payments on notification, payment request, offset request, funding request, hold request, refund/write off request, upload request, payment agreement request, invoice request, inbound message processing, reconciliation, entity audit, premium repricing, etc.</p> <p>It describes all screens related to these features and explains how to perform various tasks related to the feature in the application.</p>
<i>Oracle Revenue Management and Billing Upgrade Path Guide</i>	<p>Explains the path and pre-requisites for upgrading Oracle Revenue Management and Billing from one version to another.</p>
<i>Oracle Revenue Management and Billing Upgrade Guide</i>	<p>Explains how to upgrade the ORMB application server and database from one version to another. It also explains how to migrate the ORMB data from one version to another and describes the additional tasks that you need to perform after upgrading from one version to another.</p> <p>It includes various appendices that contain information about new tables introduced in the current release, existing tables which are modified in the current release, dropped algorithms and algorithm types, dropped characteristic types, dropped algorithm parameters, dropped option types in feature configurations, ORMB rollup packs, and SQL statements used for data migration.</p>
<i>Oracle Revenue Management and Billing Direct Database Upgrade Guide</i>	<p>Explains how to directly upgrade the ORMB database from 2.3.0.2.0 or any later version to the current release. It also highlights any known issues during direct database upgrade and how to handle these issues in the database.</p>
<i>Oracle Revenue Management and Billing Transaction Feed Management - Batch Execution Guide</i>	<p>Explains the sequence in which the batches should be executed while performing various tasks in the Transaction Feed Management (TFM) module.</p> <p>It provides detailed information about each TFM batch and its parameters. It also indicates the restart and multi-threading ability of each batch. In addition, it recommends values for various parameters which can be used for tuning batch performance as per the available hardware.</p>

Document Name	Description
<i>Oracle Revenue Management and Billing Batch Guide</i>	Provides detailed information about various batches which are used in different modules, such as billing, payments, financial transaction, pricing management, funding request, offset request, hold request, upload request, inbound message, payment agreement request, accruals, earnings credit rate, ILM, deferred revenue recognition, reconciliation, garbling, repricing, entity audit, statements, etc. It also contains information about the batch parameters and the batch restart and multi-threading abilities.

## Change Log

Revision	Last Update	Updated Section	Comments
1.1	21-Jan-2022	Age Based and Tier Based Pricing Rule Audit Process	Added Information
1.2	25-Jan-2022	New Features (Generic)	Added Information
		Enhancements (Generic)	Added Information
		Enhancements (Specific to Insurance)	Updated Information
1.3	21-Mar-2022	Deal Inactivation	Updated Information
		Supported Platforms	Updated Information
1.4	08-Apr-2022	Deprecation Planned for Future Releases	Added Information
1.5	02-May-2022	Supported Platforms	Updated Information
1.6	12-Sep-2022	Known Issues	Updated Information
1.7	21-Nov-2022	Oracle Utilities Application Framework Version 4.4.0.3.0 Enhancements	Added Section



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## Prerequisites

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If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 3.2.0.0.0, 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 3.1.0.0.0 will not happen successfully.
- Transactions which are uploaded using 3.1.0.0.0 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 and value. Otherwise, erroneous results might occur.

## New Features (Generic)

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

- [Approval Process for Hold Request Release](#)
- [Hold Refund](#)
- [Hold Mass Accounts Using Selection Criteria](#)
- [FOP Reports](#)
- [Hold Request Creation, Modification, Release, and View Through Inbound Web Service](#)
- [Hold Direct Debit Instruction](#)
- [GL Posting for Zero Valued Transaction](#)
- [Deleting Inactive Customer or Closed Account Information](#)

### Approval Process for Hold Request Release

Earlier, you were able to configure the approval process for activating a hold request. Now, you can configure the approval process for activating and/or releasing a hold request. To introduce this feature, the following changes are made in the system:

- The **Approval Required**, **Approval To Do Type**, and **Approval To Do Role** fields in the **Hold Request Type** screen are renamed to **Activation Approval**, **Activation Approval To Do Type**, and **Activation Approval To Do Role**, respectively.
- The **Release Approval**, **Release Approval To Do Type**, and **Release Approval To Do Role** fields are newly added in the **Hold Request Type** screen.
- The description of the **APPRPROGRESS** status in the **C1-HoldRequest** business object is changed to **Activation Approval In Progress**.
- The following new statuses are introduced in the **C1-HoldRequest** business object:
  - Release Approval in Progress
  - Release Request Approved
  - Return Release Request to Submitter

If you want to configure the approval process for hold request activation, you need to set the following fields in the respective hold request type - **Activation Approval**, **Activation Approval To Do Type**, and **Activation Approval To Do Role**. However, if you want to configure the approval process for hold request release, you need to set the following fields in the respective hold request type - **Release Approval**, **Release Approval To Do Type**, and **Release Approval To Do Role**. You can set the same or different approval configuration for hold request activation and release.

On clicking the **Release** button, the system does the following:

If...	Then...
<p>The <b>Release Approval</b> option is selected in the respective hold request type</p>	<p>A To Do is created using the To Do type specified in the <b>Release Approval To Do Type</b> field and sent to the approver having a To Do role specified in the <b>Release Approval To Do Role</b> field. The status of the hold request is then changed to <b>Release Approval in Progress</b>.</p> <p>The approver can review, and accordingly approve or resubmit the hold request based on the observations. On clicking the <b>Approve</b> button, the system updates the hold entity, hold process, and hold request end dates and then changes the status of the hold request to <b>Released</b>.</p> <div data-bbox="824 764 1411 963" style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> If the hold request is created for an account, the system also updates the following dates - <b>Bill After Date, Postpone Credit Review Until, Defer Auto Pay Date, and Hold Request Until</b>.</p> </div> <p>However, on clicking the <b>Resubmit</b> button, the system enables you to enter the reason why you want to reject the hold release request. Once you specify the reason, the system changes the status of the hold request to <b>Active</b>. In addition, a To Do is created using the To Do type specified in the <b>Submitter To Do Type</b> field and sent to the approver having a To Do role specified in the <b>Submitter To Do Role</b> field.</p>
<p>The <b>Release Approval</b> option is not selected in the respective hold request type</p>	<p>The system then changes the hold entity, hold process, and hold request end dates. Finally, the status of the hold request is changed to <b>Released</b>.</p> <div data-bbox="824 1493 1411 1692" style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> If the hold request is created for an account, the system also updates the following dates - <b>Bill After Date, Postpone Credit Review Until, Defer Auto Pay Date, and Hold Request Until</b>.</p> </div>

## Hold Refund

Until now, you were able to hold the bill generation, auto pay, funding, and overdue process for an account through a hold request. Now, in addition, the system enables you to hold the refund process for an account through a hold request. If the refund process is kept on hold for an account, the system does not process the refund requests (if any) created for the account. However, the system does not stop you from creating A/P adjustments for an account from the **Adjustment** screen when the refund process is kept on hold for the account.

While adding the refund process in a hold request, you need to specify the date range for which you want to hold the refund process for the accounts. The system enables you to add the refund process in a hold request from the user interface or through the upload request feature. If you want to create a hold request for an account through the upload request feature, you need to specify the following details in the CSV file:

- Whether you want to hold the refund process for the accounts (the valid values are Y or N)
- Hold refund start date (required if the hold refund is set to Y)
- Hold refund end date

On activating a hold request, the system stamps the hold refund until date corresponding to each account in the hold request. The hold refund until date is set to the hold entity end date or refund process end date whichever is earlier. This means that the system will allow to process the refund request of the account only after hold refund until date. If the number of accounts in a hold request is less than the defer processing count specified in the respective hold request type, the system stamps the hold refund until date immediately for each account in the hold request. In addition, the system changes the status of the refund request (if any) for respective accounts to **Hold**.

However, if the number of accounts in a hold request is equal to or greater than the defer processing count specified in the respective hold request type, the system stamps the hold refund until date for each account in the hold request when the **C1-HLMON** batch is executed. In addition, the **C1-HLMON** batch changes the status of the refund request (if any) for respective accounts to **Hold**.

When you manually release a hold request from the user interface, the system sets the hold request, hold entities, and hold processes end dates (which are later than or equal to the system date) to the system date and then changes the status of the hold request to **Released**. In addition, if the number of accounts in a hold request is less than the defer processing count specified in the respective hold request type, the system immediately sets the hold refund until date (which is later than or equal to the system date) to the system date for the account in the hold request. In addition, the system immediately changes the status of the refund request (if any) for respective accounts from **Hold** to its previous status.

However, if the number of accounts in a hold request is equal to or greater than the defer processing count specified in the respective hold request type, the system sets the hold refund until date (which is later than or equal to the system date) to the system date for the account in the hold request when the **C1-HLMON** batch is executed. In addition, the **C1-HLMON** batch changes the status of the refund request (if any) for respective accounts from **Hold** to its previous status.

## Hold Mass Accounts Using Selection Criteria

Until now, you were able to add multiple accounts in a hold request by specifying their respective account ID. Now, this feature is extended wherein you can specify a selection criteria to derive the list of accounts which you want to add in a hold request. A new option named **Use Selection Criteria** is available when you set the entity to **Account** while creating a hold request. On selecting the **Use Selection Criteria** option, the **Hold Entities** section is removed from the **Hold Request** screen. Instead, a new section named **Account Selection Criteria** appears in the **Hold Request** screen. This section enables you to specify the criteria for deriving accounts using the account, person, policy, or individual membership details. You can specify the criteria for deriving accounts using the policy or individual membership details only when the **Environment Type** option type of a feature configuration which is created using the **General System Configuration** feature type is set to **H**.

A new status named **Entity Derivation Pending** is added in the lifecycle of the **C1-HoldRequest** business object. While saving a hold request with account selection criteria, the system creates the hold request in the **Entity Derivation Pending** status. However, while saving a hold request without account selection criteria, the system creates the hold request in the **Draft** status.

A new batch named **C1-HLDET** is introduced in this release. It checks whether there are any hold requests in the **Entity Derivation Pending** status. The system considers those hold requests whose start date is earlier than or equal to batch business date. If there are is a hold request in the **Entity Derivation Pending** status, the batch derives the accounts for the hold request and then changes the status of the hold request from **Entity Derivation Pending** to **Draft**.

You can then add more accounts (if required) manually from the user interface. You can also edit or delete the accounts derived through the criteria from the hold request.

## FOP Reports

Oracle Revenue Management and Billing enables you to extract data using the following FOP reports:

- **To Do Report** – Enables you to view the notifications (i.e. To Dos) assigned to a user and its current status. It helps the user to take actions on the To Dos based on their priority.
- **Hold Details Report** – Enables you to view all entities (i.e. persons, accounts, or bills) for which the business processes, such as bill generation, automatic payment, funding, overdue, or refund, are on hold for a given period. It helps the operational and finance teams to review the entities and business processes which are on hold.
- **Transaction Rejection Summary Report** – Enables you to view the number of transactions mapped to a particular account and price item combination which are in the **Error** or **Ignored** status. It helps the operational team to take the required corrective actions.
- **Transaction Rejection Details Report** – Enables you to view the details of the transactions which are in the **Error** or **Ignored** status. It helps the operational team to take the required corrective actions.

These FOP reports are not shipped with the product. Oracle Revenue Management and Billing provides the `ToDoReport`, `HoldEntityDetailsReport`, `TransactionRejectionSummary`, and `TransactionRejectionDetail`

XSL files using which you can create the respective report. Once the FOP report is created, you can extract the data from the system in the PDF format using the FOP report.

## Hold Request Creation, Modification, Release, and View Through Inbound Web Service

Oracle Revenue Management and Billing enables you to create, edit, and release a hold request through a web service. It also enables you to view the details of a hold request through a web service. You can send the hold request creation, modification, release, or view request from the external system through an inbound web service. The following business services are shipped with the product to support different hold request operations:

Business Service	Description
C1-CreateHoldRequest	<p>Used to create a hold request for a single entity (i.e. for a particular person, account, or bill). While sending the request for hold request creation, you need to specify the following details:</p> <ul style="list-style-type: none"> <li>• Hold request type, hold request start date, and hold request end date or hold days (which is used to calculate hold request end date if not specified)</li> <li>• Entity (i.e. ACCT, BILL, or PERS) for which you want to create the hold request</li> <li>• Hold reason and comments</li> <li>• Entity identifiers when entity is account or person and entity ID when entity is bill</li> <li>• Hold entity and hold process end dates</li> <li>• Business process (i.e. ATPY, BILL, FNDG, OVDU, REFD) which you want to hold for the entity</li> <li>• Characteristics of hold request</li> </ul> <p><b>Points to Note:</b></p> <ul style="list-style-type: none"> <li>• You must specify an active hold request type where the approval process is not configured for activation and release.</li> <li>• If you do not specify the hold request type, the system, by default, considers the hold request type specified in the <b>Default Hold Request Type for IWS</b> option type of the <b>C1-HOLDSRCH</b> feature configuration.</li> <li>• This service does not allow you to create past dated or future dated hold request. Therefore, you must always set the hold request start date to the system date.</li> </ul> <p>On creating a hold request, the status of the hold request is set to <b>Active</b>. Once the hold request is created through the service, the hold request ID is sent in the response along with its status. The system enables you to track the hold request creation response sent to the external system using the Inbound Web Service History feature.</p>



Business Service	Description
C1-UpdateHoldRequest	<p>Used to edit an active hold request. Through this service, you can edit the following details of an active hold request:</p> <ul style="list-style-type: none"> <li>• End date, comments, and characteristics of a hold request</li> <li>• End date of a single hold entity in a hold request</li> <li>• End date of multiple hold processes in a hold request</li> </ul> <p>It also allows you to delete a characteristic of a hold request. While sending the request for hold request modification, you need to specify the following details:</p> <ul style="list-style-type: none"> <li>• Hold request ID</li> <li>• Hold entity ID (i.e. person ID, account ID, or bill ID)</li> </ul> <p>Once the hold request is edited through the service, the hold request ID is sent in the response. The system enables you to track the hold request modification response sent to the external system using the Inbound Web Service History feature.</p>
C1-GetHoldRequestHistory	<p>Used to fetch the details of an active hold request with a single entity (i.e. person, account, or bill). The system enables you to track the hold request view response sent to the external system using the Inbound Web Service History feature.</p>
C1-ReleaseHoldRequest	<p>Used to release an active hold request with a single entity (i.e. person, account, or bill). While sending the request for hold request release, you need to specify the following details:</p> <ul style="list-style-type: none"> <li>• Hold request ID</li> <li>• Hold release reason and comments</li> </ul> <p>Once the hold request is released through the service, the hold request ID is sent in the response along with its status and end date. Note that the hold request end date is set to the system date. The system enables you to track the hold request release response sent to the external system using the Inbound Web Service History feature.</p>

You can create one inbound web service which supports all four operations — hold request creation, hold request update, hold request release, and hold request view. Alternatively, you can create four different inbound web services — one for hold request creation, another for hold request update, third for hold request release, and fourth for hold request view.

You can create a SOAP or REST based inbound web service. If you want to send the request in the XML and/or JSON format, you need to ensure that you create a REST based inbound web service. However, if you want to send the request in the XML format, you can create a SOAP or REST based inbound web service.

## Hold Direct Debit Instruction

In the financial services and health insurance domains, there might be scenarios wherein the customers would like to review their invoices before the charges are directly debited from their accounts. In such scenarios, there is a need to hold a direct debit (i.e. automatic payment) for a bill until the confirmation is received from the customer.

Oracle Revenue Management and Billing provides the ability to hold a direct debit (i.e. automatic payment) for a bill until the confirmation is received from the customer. A new field named **Auto Pay Review Required** is added in the **Auto Pay** tab of the **Account** screen. On completing a bill for an account, the system creates the automatic payment records in the **CI\_BILL\_ACH** table as per the auto pay instructions defined for the account. If the **Auto Pay Review Required** option is selected, the system sets the **EXTRACT\_ELIG\_SW** column corresponding to the automatic payment records in the **CI\_BILL\_ACH** table to **N**. However, if the **Auto Pay Review Required** option is not selected, the system sets the **EXTRACT\_ELIG\_SW** column corresponding to the automatic payment records in the **CI\_BILL\_ACH** table to **Y**. The **EXTRACT\_ELIG\_SW** column indicates whether the automatic payment record is eligible for the extraction. If the **EXTRACT\_ELIG\_SW** column is set to **N**, the **APAYCRET** batch does not consider the automatic payment record in the **CI\_BILL\_ACH** table for automatic payment creation.

Once the confirmation is received for one or more bills, the system enables you to create an automatic payment request for the bills. While creating an automatic payment request, you need to specify an automatic payment request type using which you want to create the automatic payment request. It is the automatic payment request type which helps the system to determine:

- The business object using which the automatic payment request should be created in the system
- Whether the approval is required for the automatic payment request

Once you specify the automatic payment request type, the system creates the automatic payment request in the **Draft** status. You can then include the bills for which invoice confirmation is received from the customers in the automatic payment request. At least one bill should be included in the automatic payment request. Before submitting an automatic payment request, you need to do the following:

- Edit the Schedule Extract Date (if required) of each bill
- Set the **Eligible for Extraction** field of each bill to **Y**

You can also delete a bill from an automatic payment request when it is in the **Draft** status. Once you edit the required details of the bills in an automatic payment request, you can submit the automatic payment request. If the approval process is not configured in the respective automatic payment request type, the system does the following:

- Updates the **ELIG\_EXTRACT\_SW** and **APAY\_CRE\_DT** columns corresponding to the automatic payment records in the **CI\_BILL\_ACH** table
- Changes the status of the automatic payment request to **Processed**

If the approval process is configured in the respective automatic payment request type, the system changes the status of the automatic payment request to **Approval In Progress**.

A To Do notification is created for the approver using the approval To Do type (specified in the respective automatic payment request type) and assigned to the users with the approval To Do role (specified in the respective automatic payment request type). Once the approver reviews an automatic payment request, the approver can approve, reject, or resubmit the automatic payment request based on the observations. If the approver approves the automatic payment request, the system does the following:

- Updates the **ELIG\_EXTRACT\_SW** and **APAY\_CRE\_DT** columns corresponding to the automatic payment records in the **CI\_BILL\_ACH** table
- Changes the status of the automatic payment request to **Processed**

If the approver rejects an automatic payment request, the status of the automatic payment request is changed to **Rejected**. However, if the approver requests the submitter to resubmit an automatic payment request, the status of the automatic payment request is changed to **Draft**. A To Do notification is created for the submitter using the submitter To Do type (specified in the respective automatic payment request type) and assigned to the users with the submitter To Do role (specified in the respective automatic payment request type). While rejecting or resubmitting an automatic payment request, the approver needs to specify the reason for rejection or resubmission.

To implement the hold direct debit feature, the following new screens are introduced in this release:

- **Auto Pay Request Type** - Enables you to create, edit, delete, and copy an automatic payment request type.
- **Auto Pay Request (Used for Searching)** - Enables you to search for an automatic payment request. It also enables you to create an automatic payment request.
- **Auto Pay Request (Used for Viewing)** - Enables you to edit, delete, submit, approve, reject, and resubmit the automatic payment request. It also enables you to add, edit, and delete bills from the automatic payment request.

In addition, the following changes are made to the system:

- **Auto Pay Review Required** – This field is added in the **Auto Pay** tab of the **Account** screen. It indicates whether you want to hold direct debit (i.e. automatic payment) for the bills of the account until the confirmation is received from the customer.
- **Eligible for Extraction** – This column is added in the **Auto Pay** tab of the **Bill** screen. It indicates whether the automatic payment record for the bill is eligible for extraction.

## GL Posting for Zero Valued Transaction

Until now, the system did not create FT GL entries for a zero amount financial transaction (i.e. bill segment, payment, adjustment, etc.) Now, the system enables you to create dual FT GL entries for a zero amount financial transaction. A new option type named **Allow non-significant zero amount FT GL entry** is added in the **C1\_FINTRANOP** feature configuration. To enable dual FT GL creation for a zero amount financial transaction, you need to set the **Allow non-significant zero amount FT GL entry** option type of the **C1\_FINTRANOP** feature configuration to **Y**. The system considers the FT GL amount as significant when the statistical and total amount of the financial transaction is non-zero.

## Deleting Inactive Customer or Closed Account Information

Oracle Revenue Management and Billing enables you to delete all records of a person or account from the system. A new batch named **C1-GDPR** is introduced in this release. It enables you to delete all records of a person or account from the system. You can either delete the records of a particular person or account using its ID or delete the records of a set of persons or accounts at once using its characteristic. A new characteristic type named **C1-GDPRE** is shipped with the product. While executing the batch, the system first checks whether the person or account ID is specified in the batch. If so, the batch deletes the records of the respective person or account from the system. You cannot specify both the person and account ID at the same time while executing the batch.

If the person or account ID is not specified while executing the batch, the system checks whether the **Delete Characteristic Type** parameter is defined in the **C1-GDPR** batch. You can define the **C1-GDPRE** characteristic for the persons or accounts whose records you want to delete from the system. If you set the **Delete Characteristic Type** parameter in the **C1-GDPR** batch to **C1-GDPRE**, the batch considers those person or accounts for deletion where the **C1-GDPRE** characteristic is set to **Y**.

The system deletes all records of a particular account only when the following conditions are met:

- Account's closing date is earlier than or equal to system date
- All contracts of the account should either be in the **Closed** or **Canceled** status

The system deletes all records of a particular person only when the following conditions are met:

- The closing date of all its accounts is earlier than or equal to system date
- All contracts of all its accounts should either be in the **Closed** or **Canceled** status

The **C1-GDPR** batch contains the following parameters:

- **Account ID** – Used to indicate the account whose records you want to delete from the system.
- **Person ID** – Used to indicate the person whose records you want to delete from the system.
- **Delete Characteristic Type** – Used to specify the characteristic type. Here, you must specify the **C1-GDPRE** characteristic type. The system then considers those person or accounts for deletion where the **C1-GDPRE** characteristic is set to **Y**.
- **Clear CLOB Data** – Used to indicate whether you want to delete the references of the persons or accounts considered for deletion from the CLOB data. The valid values are **Y** and **N**. Note that if you set the value for this parameter to **Y**, the performance of the batch would be impacted when there is voluminous data.
- **Thread Pool Name** – Used to specify the thread pool on which you want to execute the batch.

The **C1-GDPR** batch is a multi-threaded batch. The multi-threading is based on the person or account ID and chunks for multi-threading are created based on numerical distribution of person or account ID.

## New Features (Specific to Financial Services)

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

- [Deal Inactivation](#)
- [Retail Banking Product Inbound Web Services](#)

### Deal Inactivation

Oracle Revenue Management and Billing enables the relationship manager to create multiple deals and deal versions until he reaches the best-optimized deal for a customer. Most of the deals which are created to check multiple permutation combinations to reach the best deal are later not updated in the system. Oracle Revenue Management and Billing provides the ability to automatically inactivate such deals which are not active in the system for a long time. Now, the system stamps the last updated date on a deal when an action is performed on the deal or when there is a change in the deal status.

A new algorithm spot named **Deal Inactivation** is introduced in the **Deal Type** screen. A new algorithm type named **C1-INACDEAL** is shipped with the product. To automatically inactivate the deals which are not updated in the system for a long time, you need to:

- Attach an algorithm which is created using the **C1-INACDEAL** algorithm type to the **Deal Inactivation** system event in the required deal types. This algorithm does the following:
  - Calculates the following dates for the deal:
    - **Deal Inactivation Date** = Last Updated Date + Days to Inactivate Deal
    - **First To Do Reminder Date** = Deal Inactivation Date – To Do Remainder Days
    - **Second To Do Remainder Date** = Deal Inactivation Date – To Do High Priority Days
  - Creates two reminder notifications (i.e. To Dos) for the relationship manager which indicates that the system will inactivate the deal on a particular date if no actions are performed on it before the deal inactivation date. The reminder notifications are sent when the First To Do Reminder Date or Second To Do Remainder Date is equal to the system date.
  - Changes the status of the deal to **Inactive** when the deal inactivation date is equal to the system date.
- Set the following fields in the required deal types:
  - **Days to Inactivate Deal** – Used to indicate the number of days after which the deal should be inactivated when it is not active in the system. Here, you must specify a numeric value greater than zero. In addition, the numeric value should be greater than the values specified in the **To Do Reminder Days** and **To Do High Priority Days** fields. This field is required when the deal inactivation algorithm is attached to the deal type.
  - **To Do Reminder Days** - Used to indicate the number of days using which the system calculates the first To Do reminder date.

- **To Do High Priority Days** - Used to indicate the number of days using which the system calculates the date when the To Do reminder of highest priority should be sent.

The deal inactivation algorithm is triggered when the **C1\_DLMTR** batch is executed. The **C1\_DLMTR** batch considers all deals which are in the following status:

- Draft
- Error
- Hierarchy Creation Deferred
- Pending For Approval
- Pending Simulation
- Ready For Approval
- Simulated
- Simulation Deferred

A new status named **Inactive** is introduced in the **C1-DEAL** business object. Once a deal is inactivated, you can only view the profitability details of its deal version and extract the deal version information in the PDF and Excel formats. In addition, if the inactivated deal has simulation date, then its deal version is available for deal comparison. The other functionalities, such as viewing approval workflow, finalizing deal, accepting deal, rejecting deal, deal orchestration, reviewing deal, etc. are not available for an inactivated deal. Also, you cannot refer an inactivated deal or use an inactivated deal as a template deal.

## Retail Banking Product Inbound Web Services

Oracle Revenue Management and Billing provides the ability to do the following through an inbound web service:

- View the details of a retail banking product, market product, offer, and bundle
- Derive the eligible market product, offer, and bundle for a person or an account

The following inbound web services are shipped with the product:

- **C1-GetEligibleProduct** - This is a SOAP based inbound web service. It supports the XML format. It enables you to derive eligible active market products, offers, and bundles for the person or account on the processing date. You can specify the eligibility parameters along with the person or account details when you want to simulate the response. It also enables you to view the details of an active product, market product, offer, and/or bundle which is effective on the processing date. You can extract the data in the following templates:
  - **Summary** – Used when you want to extract the details of the market product, offer, and/or bundle without pricing.
  - **Detail** – Used when you want to extract the details of the market product, offer, and/or bundle with pricing.

- **C1-GetEligibleProductRest** – This is a REST based inbound web service. It supports the JSON and XML formats. It enables you to derive eligible active market products, offers, and bundles for the person or account on the processing date. You can specify the eligibility parameters along with the person or account details when you want to simulate the response. It also enables you to view the details of an active product, market product, offer, and/or bundle which is effective on the processing date. You can extract the data in the following templates:
  - **Summary** – Used when you want to extract the details of the market product, offer, and/or bundle without pricing.
  - **Detail** - Used when you want to extract the details of the market product, offer, and/or bundle with pricing.
- **C1-GetProdDetail** - This is a SOAP based inbound web service. It supports the XML format. It enables you to view the details of an active market product, offer, or bundle which is effective on the processing date. You can extract the data in the following templates:
  - **Summary** – Used when you want to extract the details of the market product, offer, or bundle without pricing.
  - **Detail** - Used when you want to extract the details of the market product, offer, or bundle with pricing.
- **C1-GetProdDetailRest** - This is a REST based inbound web service. It supports the JSON and XML formats. It enables you to view the details of an active market product, offer, or bundle which is effective on the processing date. You can extract the data in the following templates:
  - **Summary** – Used when you want to extract the details of the market product, offer, or bundle without pricing.
  - **Detail** - Used when you want to extract the details of the market product, offer, or bundle with pricing.

## New Features (Specific to Insurance)

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

- [Health Product 360° View](#)
- [Young Adult Coverage in an Individual Membership](#)

### Health Product 360° View

Until now, you were able to add and edit the health products and health plans through a health product and plan inbound message. But, you were not able to view the details of a health product and health plan from the user interface. Now, Oracle Revenue Management and Billing provides the ability to view the details of a health product and health plan from the user interface. A new screen named **Health Product 360° View** is introduced in this release. It enables you to search for a health product or health plan using the respective details. You can navigate to the **Health Product 360° View** screen from the **Pricing Management** menu. Through the **Health Product 360° View** screen, you can navigate to the following new screens:

- **Health Product 360° Information** – Enables you to view the details of the health product including its characteristics and health plans.
- **Health Plan 360° Information** – Enables you to view the details of the health plan including its characteristics and pricing rules.

### Young Adult Coverage in an Individual Membership

Oracle Revenue Management and Billing enables you to calculate premium for the young adults who are covered in an individual membership. While creating or editing an individual membership, or while adding, editing, or inactivating a member person in an individual membership through a health care inbound message or through membership repricing inbound web service, the system derives the fully-insured pricing business rule for the individual membership. The system enables you to define the following young adult related output parameters in the fully-insured pricing business rules:

- **Young Adult Applicability** – Used to indicate whether you want to consider the young adults during the premium calculation. The valid values are - **Yes** and **No**.
- **Young Adult Max Age Limit** – Used to indicate the maximum age limit for young adults who are eligible for premium calculation. This output parameter is mandatory when the **Young Adult Applicability** parameter is set to **Yes**.

While deriving member relationship for each member person of the individual membership from a member relationship structure, the system considers the following information from the fully-insured pricing business rule of the individual membership:

- Young Adult Applicability
- Young Adult Max Age Limit



Similarly, while deriving subscription tier for the individual membership from a subscription tier structure, the system considers the following information from the fully-insured pricing business rule of the individual membership:

- Young Adult Applicability
- Young Adult Max Age Limit

Thus, while calculating the premium for an individual membership using an age based or tier based pricing rule, the system considers the young adult for the premium calculation based on the above two parameters set in the fully-insured pricing business rule.

# Enhancements (Generic)

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

- [Hold Request](#)
- [Refund Request](#)
- [Alternate Sequential Bill Numbers](#)
- [File Upload Interface](#)
- [Payment Processing through Payment Upload \(PUPL\) Batch](#)
- [Fully-Insured Group and Individual Billing](#)

## Hold Request

The following changes are made to the Hold Request feature:

- Now, both the hold request start date and end date are mandatory. The hold request start date can be a future date. The system allows you to activate a future dated hold request.
- The hold process and hold entity start dates are mandatory. But, the hold process and hold entity end dates are optional.
- The following statuses are newly added in the lifecycle of the **C1-HoldRequest** business object:
  - Entity Derivation Pending
  - Release Approval in Progress
  - Release Request Approved
  - Return Release Request to Submitter
  - Discarded
- The **Discard** button is available for a future dated hold request. In other words, the **Discard** button is not available when the hold request start date is earlier than or equal to the system date. On clicking the **Discard** button, you need to specify the reason why you want to discard the hold request. The system then changes the status of the hold request to **Discarded**.
- Now, the defer processing count in the hold request type is also used for the **Hold Refund** feature.
- The **C1-HLMON** batch is enhanced to support the **Hold Refund** feature.
- The OraSearch functionality is available for the **State** field in the **Search Account** and **Search Bill** zones.

## Refund Request

The following changes are made to the Refund Request feature:

- A new status named **Hold** is introduced in the lifecycle of the **C1-RefundReq** business object.
- On submitting or approving a refund request, the system checks whether the refund process is on hold for the account. If so, the system changes the status of the refund request to **Hold**.

- While creating a new refund request for an account for which the refund process is on hold, the system creates the refund request in the **Draft** status and then changes the status of the refund request from **Draft** to **Hold**.

## Alternate Sequential Bill Numbers

Until now, the system enabled you to generate alternate sequential bill numbers for completed bills. Now, in addition, you can generate alternate sequential bill numbers for pending bills. A new parameter named **Process Pending Bills** is introduced in the **Assign Sequential Bill Numbers (ASSGNSBN)** batch. It enables you to indicate whether the system should generate alternate sequential bill numbers for pending or completed bills. The valid values are:

- **Y** – Used when you want to generate alternate sequential bill numbers for pending bills.
- **N** – Used when you want to generate alternate sequential bill numbers for completed bills.

If you do not specify the value for this parameter, by default, it is set to **N**.

## File Upload Interface

The following changes are made to the File Upload Interface feature:

- Earlier, while uploading a single file using a file request type where the **Skip Duplicate** option is selected, the **C1-FTRAN** batch could successfully mark identical records within the same file as duplicate (using duplicate record identifier expression) and ignore them during file upload. But, the **C1-FTRAN** batch abruptly ended when multiple files were uploaded at the same time using a file request type where the **Skip Duplicate** option is selected. Now, the **C1-FTRAN** batch successfully marks identical records across multiple files as duplicate (using duplicate record identifier expression) and ignores them during file upload.

## Payment Processing through Payment Upload (PUPL) Batch

The **Payment Upload (PUPL)** batch faces significant performance issues when the number of payment segments is huge for a single payment event or payment. To handle this performance issue, the system provides an alternative three-step approach wherein you need to execute the following batches in the specified sequence:

1. **PUPL** – The following new parameters are added in the **PUPL** batch:
  - **Three Step Batch Processing (Y/N)** – Used to indicate whether you want to use three-step approach for uploading payment records from the staging area. The valid values are **Y** and **N**. If you do not specify the value for this parameter or set the parameter value to **N**, you need to just execute the **PUPL** batch in the traditional manner.

However, if you set the parameter value to **Y**, you need to execute the **PUPL**, **PUPPDF**, and **PUPLCMPL** batches in the specified sequence. In the three-step approach, the **PUPL** batch creates the deposit control, tender controls, payment events, tenders, and payments in the staging area using the payment records from the pre-staging area.

The status of the payment is set to **Step in Process**. In addition, the payment distribution algorithm is triggered and the payment distribution records are created in the **CI\_PAY\_DIST\_TEMP** table.

- **Division** – Used when you want to create payments for accounts belonging to a particular division.
  - **Bulk Insert Count** – Used to indicate the number of records that you want to insert at once in the **CI\_PAY\_DIST\_TEMP** table.
2. **PUPLDF** - This batch considers the payment distribution records from the **CI\_PAY\_DIST\_TEMP** table and accordingly creates the payment segments. In addition, it creates the financial transaction for each payment segment and sets its status to **Frozen**. If any of the payment segment returns an error, the system will not hold the creation of other payment segments in the payment.
  3. **PUPLCMPL** – This batch changes the status of the payment to **Frozen** or **Error** depending on whether its payment segments and financial transactions are successfully created in the system. If all payments in a payment event are successfully created, the status of the corresponding deposit control, tender control, payment tender, and payment staging records is set to **Complete**. If any error occurs while creating payment event for a payment record, the status of the deposit control, tender control, payment tender, and payment staging records is changed to **Error**. In addition, the status of the payment record in the pre-staging area is changed to **Error in Staging**.

If the total amount distributed does not match with the payment amount, the status of the payment is set to **Step Process Error**. The **PUPLCMPL** batch provides an option to clean up such payments. If the **Step Processing Cleanup** parameter is set to **Y**, the **PUPLCMPL** batch does the following activities during cleanup:

- Cancels the payment which is in the **Step Process Error** status.
- Creates a new payment under the payment event with the same amount, match type, and match value. However, its payment amount is not distributed and the payment status is set to **Incomplete**.
- Changes the status of the payment staging record to **Incomplete**.

However, if the **Step Processing Cleanup** parameter is set to **N**, the batch does not initiate the cleanup process. It just changes the status of the payment staging record to **Error** when the total amount distributed does not match with the payment amount.

Note that all the three batches should be executed sequentially one after the other with the same selection criteria.

## Fully-Insured Group and Individual Billing

Earlier, while creating a billable charge for a related pricing rule, the system behaved in the following manner:

- Extended the end date of the existing billable charge when the price item, related pricing rule ID, and charge amount was same for different billable charge creation timelines
- Created a new billable charge when the price item, related pricing rule ID, and charge amount was different for different billable charge creation timelines

For example, when the following pricing rules are defined at the policy plan or health plan level:

Pricing Rule Type	Pricing Rule	Price Item	Entity Level	Start Date	End Date	Rate	Status
Age Based	PR1	P1	Policy Plan	1-Jan-21	31-Mar-21	100	Active
Age Based	PR2	P1	Policy Plan	1-Apr-21	31-Dec-21	150	Active
Additional Charge	PR3	P2	Policy Plan	1-Jan-21	31-Dec-21	Flat 10	Active

In such scenario, the system created a single billable charge for P2 (with 1-Jan-21 to 31-Dec-21 date range as shown in the below table) even when there are two primary pricing rules for P1 - PR1 which is effective from 1-Jan-21 to 31-Mar-21 and PR2 which is effective from 1-Apr-21 to 31-Dec-21.

Billable Charge	Price Item	Start Date	End Date	PREAMT
BC1	P1	1-Jan-21	31-Mar-21	100
BC2	P1	1-Apr-21	31-Dec-21	150
BC3	P2	1-Jan-21	31-Dec-21	10

Until now, when you inactivated the PR1 primary pricing rule (which is effective from 1-Jan-21 to 31-Mar-21), the system cancelled both BC1 and BC3 billable charges and there was no billable charge available in the system for P2 for the 1-Apr-21 - 31-Dec-21 date range. Now, to fix this issue, the system will store the primary pricing rule ID against each billable charge creation timeline and create different billable charge when the price item, related pricing rule ID, charge amount, and primary pricing rule ID is different for different billable charge creation timelines. Considering the above example, the system will now create the following billable charges:

Billable Charge	Price Item	Start Date	End Date	PREAMT
BC1	P1	1-Jan-21	31-Mar-21	100
BC2	P1	1-Apr-21	31-Dec-21	150
BC3	P2	1-Jan-21	31-Mar-21	10
BC4	P2	1-Apr-21	31-Dec-21	10

As a result, when you inactivate the PR1 primary pricing rule (which is effective from 1-Jan-21 to 31-Mar-21), the system will cancel BC1 and BC3 billable charges. However, the BC4 billable charge for P2 will still exist in the system for the 1-Apr-21 - 31-Dec-21 date range.

## Enhancements (Specific to Financial Services)

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

- [Deal Management](#)

### Deal Management

The following changes are made to the Deal Management feature:

- Earlier, while accepting a deal, the effective start date was defaulted to the deal start date. Now, while accepting a deal, the system defaults either of the following date:
  - Deal start date when the deal start date is equal to or later than the system date
  - System date when the deal start date is earlier than the system date

You can then edit the effective start date, if required.

- On clicking the **Show Changed Data** button in the **Pricing and Commitments** screen, the system displays the following:

If the deal is created for...	Then...
An existing customer, account, or prospect	The system displays the following records: <ul style="list-style-type: none"> <li>• Agreed pricing of a price item assigned to the customer, account, or prospect in the deal</li> <li>• Seasonal pricing of a price item assigned to the customer, account, or prospect in the deal</li> <li>• Proposed pricing of a price item from the price list with higher priority when the pricing is inherited from two or more price lists assigned to the customer, account, or prospect</li> <li>• Proposed pricing of a price item which is edited in the deal</li> <li>• Price item pricing whose default or reference commitments are edited in the deal</li> <li>• Price item pricing for which commitments are added in the deal from the <b>Pricing and Commitments</b> screen</li> <li>• Price item pricing where there is difference between original and proposed cost</li> </ul>

If the deal is created for...	Then...
	<ul style="list-style-type: none"> <li>• Price item pricing where there is difference between original and proposed average price</li> <li>• Price item pricing where there is difference between original and proposed revenue</li> </ul>

- Now, the system has enforced restriction on who can create the deal templates in the system. A new application service named **C1-DEALTEMPLATE** is introduced in this release. If the **Change** access mode is provided for the **C1-DEALTEMPLATE** application service to a user group, the users who belong to the user group can create the deal templates in the system. Now, the **Template Deal** field is no longer available while creating a deal. Instead, the **Save as Template** button is available while creating a deal. If the deal creator has the change access mode for the **C1-DEALTEMPLATE** application service, the **Save as Template** button is enabled while creating a deal. However, if the deal creator does not have the change access mode for the **C1-DEALTEMPLATE** application service, the **Save as Template** button is disabled while creating a deal. If you click the **Save as Template** button, the system, by default, sets the **Template Deal** field to **Y** while saving the deal information. And, if you click the **Save** button, the system sets the **Template Deal** field to **N** while saving the deal information. After you save the deal information either using the **Save as Template** or **Save** button, the **Template Deal** field appears in the **Main** section of the **Deal** zone.
- Earlier, you were able to add terms and conditions for a deal until the deal is in the **Pending Simulation** status. Now, you can add terms and conditions for a deal until the deal is in the **Customer Accepted** or **Rejected** status.
- Now, the system enables you to add adhoc terms and conditions for a deal. Similarly, you can add deal-specific adhoc terms and conditions for a price item and hierarchy entity from the **Pricing and Commitments** screen.
- The system enables you to view the details of the terms and conditions attached to a deal from the **Deal Information** screen. A new column named **View** is added in the **Terms and Conditions** grid of the **Deal** zone. On clicking the **Edit** icon, you can view and edit the details of the terms and conditions. The changes made to the terms and conditions are specific to the deal and therefore these changes are stored at the deal level. The original set of terms and conditions are not modified in the system. You can also download the terms and conditions attachment (if any) from the **Deal** screen.
- Earlier, you were able to add deal-specific terms and conditions for a price item or hierarchy entity until the deal is in the **Pending Simulation** status. Now, you can add deal-specific terms and conditions for a price item or hierarchy entity until the deal is in the **Customer Accepted** or **Rejected** status.
- The system enables you to view the details of the deal-specific terms and conditions of a price item or hierarchy entity from the **Pricing and Commitments** screen. A new column named **View** is added in the **Deal-Specific Terms and Conditions** grid of the **Mapping Terms and Conditions** screen. On clicking the **Edit** icon, you can view and edit the terms and conditions of the price item or hierarchy entity in the deal. The changes made to the terms and conditions are specific to the deal and therefore these changes are stored at the deal level. The original set of terms and conditions are not modified in the system. You can also download the terms and conditions attachment (if any) from the **Mapping Terms and Conditions** screen.

## Enhancements (Specific to Insurance)

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

- [Customer 360° View](#)
- [Individual Health Insurance Benefits](#)
- [Markup and Markdown Calculations](#)
- [Stop-Loss Accumulation for Ancillary Charges](#)
- [Aggregate Stop-Loss Pricing](#)
- [Self-Funded Pricing Rule Versioning](#)
- [Stop Loss Accumulation](#)
- [Fully-Insured Pricing Rule Audit Process](#)

### Customer 360° View

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

- A new zone named **Hold Details** is added in the **Account** tab of the **Customer 360° Information** screen. It enables you to view the hold requests which are created for the account.

### Individual Health Insurance Benefits

Until now, the system enabled you to configure a benefit sub type for the Advance Premium Tax Credit (APTC) benefits which are offered to an individual membership. While configuring a benefit sub type for the APTC benefits, you were able to specify the benefit sponsor account on which the benefit sponsor charges should be billed. These benefit sponsor charges are then deducted from the beneficiary bill.

In the health insurance domain, the benefit sponsor account for the APTC benefits varies depending on the health benefit exchange through which the individual insurance is availed. Therefore, there arises a need to derive the benefit sponsor account for each individual membership. Now, Oracle Revenue Management and Billing provides the ability to bill the benefit sponsor charges for the APTC benefits to the respective health benefit exchange. A new field named **Sponsor Account Derivation Algorithm** is available when you select the **Charge Benefit Sponsor** option while defining or editing a benefit sub type. Here, you can attach an algorithm which will derive the benefit sponsor account to which the benefit sponsor charges should be billed. If the **Charge Benefit Sponsor** option is selected while defining or editing a benefit sub type, you must either specify the benefit sponsor account or sponsor account derivation algorithm in the benefit sub type.

A new algorithm type named **C1-SPONSAC** is shipped with the product. You can create an algorithm using the **C1-SPONSAC** algorithm type and attach it to the **Sponsor Account Derivation Algorithm** field while defining a benefit sub type for the APTC benefits. This algorithm contains the following parameter:



- **Account Identifier Type** – Used to indicate that account identifier type that you want to use while deriving the benefit sponsor account.

The **C1-SPONSAC** algorithm validates the account identifier type and derives the membership exchange ID from the respective individual membership. It considers the membership exchange ID as the account identifier and derives the account using the account identifier type and membership exchange ID.

The **C1-REPC1** batch checks whether the benefit sponsor account or sponsor account derivation algorithm is specified in the benefit sub type. If the sponsor account derivation algorithm is specified in the benefit sub type, the **C1-REPC1** batch invokes the sponsor account derivation algorithm which derives the benefit sponsor account for the individual membership.

## Markup and Markdown Calculations

When the claim amount is negative and a flat markdown is applicable, the markdown amount must be a positive value. Until now, the system always considered the markdown amount as a negative value. For example, the maximum markdown is set to 10\$ and the claim amount received is -10\$. In this scenario, the system calculated the total claim amount as -20\$ (i.e.  $-10\$ - 10\$$ ). Instead, the system should calculate the total claim amount as 0\$ (i.e.  $-10\$ - (-10\$) = -10\$ + 10\$$ ). Similarly, when the claim amount is negative and a flat markup is applicable, the markup amount must be a negative value. For example, maximum markup is set to 15\$ and the claim amount received is -200\$. In this scenario, the system calculated the total claim amount as -185\$ (i.e.  $-200\$ + 15\$$ ). Instead, the system should calculate the total claim amount as -215\$ (i.e.  $-200\$ + (-15\$)$ ).

Now, the markup and markdown calculation errors for negative claim amount are resolved while calculating the following:

- Claim amount
- Ancillary amount
- SSL credits
- ASL credits
- Level funded amount
- MPP amount

## Stop-Loss Accumulation for Ancillary Charges

The following changes are made to the stop-loss feature:

- The system enables you to create the pass-through, flat, and rate-based ancillary pricing rules. Until now, you were able to accumulate stop-loss for ancillary charges which are created using the flat or rate-based ancillary pricing rules. You were not able to stop the stop-loss accumulation for ancillary charges which are created using the pass-through pricing rules as these charges were always getting accumulated irrespective of the setup on the stop-loss, aggregate stop-loss, level-funded, or minimum premium program pricing rule. Now, while creating a specific stop-loss, aggregate stop-loss, level-funded, or minimum premium program pricing rule for a bill group, you can derive pricing from a pass-through, flat, or rate-based ancillary pricing rule. If the **Pricing Rules** option is selected from the **Derive Using** list in the **Pricing Information for rule type: Ancillary** section, the system lists all the effective pass-through, flat, and rate-based ancillary pricing rules which are created using the ancillary pricing rule type.

On selecting a pass-through ancillary pricing rule in the specific stop-loss, aggregate stop-loss, level-funded, or minimum premium program pricing rule, the billable charge line type is derived from the line item which is specified for the **Pass Through without Markup or Markdown** pricing arrangement in the respective ancillary pricing rule type. You can then indicate whether the billable charge line type of the pass-through ancillary pricing rule is eligible for stop-loss.

- While defining or editing the specific stop-loss, aggregate stop-loss, level funded, and minimum premium program pricing rules for a bill group, the **Rate Based** column is removed from the **Billable Charge Line Types** grid of the **Pricing Information for rule type: Ancillary** section. Instead, a new column named **Pricing Arrangement** is added in the grid. It contains the following values:
  - **Pass Through (Markup or Markdown Optional)** – Used to indicate that the ancillary charge is a flat charge with or without markup or markdown. The system then considers the flat ancillary charge for stop-loss calculation.
  - **Pass Through without Markup or Markdown** – Used to indicate that the ancillary charge is a pass-through charge without markup or markdown. The system then considers the pass-through ancillary charge for stop-loss calculation.
  - **Rate Based (Markup or Markdown Optional)** - Used to indicate that the ancillary charge is a rate-based charge with or without markup or markdown. The system then considers the rate-based ancillary charge for stop-loss calculation.

The **Pricing Arrangement** column is enabled only when the **Ancillary Billable Charge Line Type** option is selected from the **Derive Using** list.

- Earlier, while deriving pricing from a flat or rate-based ancillary pricing rule in the specific stop-loss, aggregate stop-loss, level funded, and minimum premium program pricing rules, the system did not list the default pass through charge which is created in the flat or rate-based ancillary pricing rule in the **Billable Charge Line Types** grid. The system, by default, considered that the default pass through charge is eligible for stop-loss when the ancillary charge pricing is derived from the flat or rate-based ancillary pricing rule. Now, the system lists the default pass through charge along with the flat and rate-based ancillary charges. You can then indicate whether default pass through charge in the non pass-through ancillary pricing rule is eligible for stop-loss.

## Aggregate Stop-Loss Pricing

The following changes are made to the aggregate stop-loss pricing rule:

- Until now, when the **Enrollment Based or Minimum ASL limit (whichever is greater)** option was selected from the **ASL Limit (During Policy Period)** and/or **ASL Limit (During Settlement Period)** lists, the system always expected the enrollment transactions. If there were no enrollment transactions, the system did not calculate the ASL limit, and therefore no ASL credits were given to the customer. Now, a new option named **Enrollment Based or Min ASL Limit (Available and Greater)** is introduced in the **ASL Limit (During Policy Period)** and **ASL Limit (During Settlement Period)** lists. If the **Enrollment Based or Min ASL Limit (Available and Greater)** option is selected from the **ASL Limit (During Policy Period)** and/or **ASL Limit (During Settlement Period)** lists, the system behaves in the following manner:
  - If the enrollment based limit is available, the system sets the ASL limit to either enrollment based limit or minimum ASL limit whichever is greater.
  - If the enrollment based limit is not available, the system sets the ASL limit to minimum ASL limit.
- The existing option named **Enrollment Based or Minimum ASL limit (whichever is greater)** in the **ASL Limit (During Policy Period)** and **ASL Limit (During Settlement Period)** lists is renamed to **Enrollment Based or Min ASL Limit (Greater)**.

## Self-Funded Pricing Rule Versioning

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

- Earlier, while processing an audit event for a primary pricing rule in the **C1-DISTA** batch, the system used to confirm whether you want to create reseeding requests for the related pricing rules (if any). On confirmation, the batch should to create one reseeding request for each related pricing rule. However, now, the system does not create the reseeding request for a related pricing rule in the **C1-DISTA** batch.

Now, while editing a self-funded pricing rule which is created using a primary pricing rule type, the system confirms whether you want to update the related pricing rules (such as, specific stop-loss, aggregate stop-loss, and level funded) manually. If you click the **Yes** button, the system does not automatically update the related pricing rules based on the changes made to the primary pricing rule. Hence, no reseeding request is created for a related pricing rule. However, if you click the **No** button, the system automatically updates the related pricing rules based on the changes made to the primary pricing rule. If the related pricing rule is not referred for a transaction, the system edits the existing version of the related pricing rule and does not create a new version of the related pricing rule with incremental version number. In addition, no audit event is created for the related pricing rule.

However, if the related pricing rule is referred for a transaction, the system does the following:

If...	Then...
<p>The approval workflow process is configured for the respective pricing rule and you edit a field which is:</p> <ul style="list-style-type: none"> <li>• Listed in the active audit event type of the respective business object</li> <li>• Configured for versioning</li> </ul>	<p>The system creates an approval transaction for the related pricing rule. On approving the approval transaction, the system creates a new version of the related pricing rule where the version number is incremented by 1. The status of the new version of the related pricing rule is set to <b>Disaggregation Initiated</b>. In addition, the system creates an audit event using the active audit event type for the new version of the related pricing rule. The status of the audit event is set to <b>Pending</b>.</p>
<p>The approval workflow process is not configured for the respective pricing rule and you edit a field which is:</p> <ul style="list-style-type: none"> <li>• Listed in the active audit event type of the respective business object</li> <li>• Configured for versioning</li> </ul>	<p>The system creates a new version of the related pricing rule where the version number is incremented by 1. The status of the new version of the related pricing rule is set to <b>Disaggregation Initiated</b>. In addition, the system creates an audit event using the active audit event type for the new version of the related pricing rule. The status of the audit event is set to <b>Pending</b>.</p>
<p>The approval workflow process is configured for the respective pricing rule and you edit a field which is:</p> <ul style="list-style-type: none"> <li>• Not listed in the active audit event type of the respective business object</li> <li>• Configured for versioning</li> </ul>	<p>The system creates an approval transaction for the related pricing rule. On approving the approval transaction, the system creates a new version of the related pricing rule where the version number is incremented by 1. The status of the new version of the related pricing rule is set to <b>Active</b> and the status of the old version of the related pricing rule is changed to <b>Inactive</b>.</p>
<p>The approval workflow process is not configured for the respective pricing rule and you edit a field which is:</p> <ul style="list-style-type: none"> <li>• Not listed in the active audit event type of the respective business object</li> <li>• Configured for versioning</li> </ul>	<p>The system creates a new version of the related pricing rule where the version number is incremented by 1. The status of the new version of the related pricing rule is set to <b>Active</b> and the status of the old version of the related pricing rule is changed to <b>Inactive</b>.</p>

- Earlier, in case of a primary pricing rule, the **C1-DISTA** batch derived the accounts of the parent customer or bill group and then created a disaggregation request for their accounts. Now, the **C1-DISTA** batch creates a disaggregation request for the accounts for a particular price assignment. As a result, the charges which are created for the accounts using the respective price assignment are only disaggregated.
- During the disaggregation process, the **C1-BSEGD** batch does the following:
  - Cancels the bill segments in the **Frozen** status which are created using a primary pricing rule for which disaggregation request is created.

- Deletes the bill segments in the **Freezable** to **Error** status which are created using a primary pricing rule for which disaggregation request is created.

Note that the system does not cancel or delete the bill segments which are created using a related pricing rule, such as, specific stop-loss, aggregate stop-loss, and level funded. Here, despite being a related pricing rule, the system behavior for a retention type claim based pricing rule is similar to a primary pricing rule and not to a related pricing rule.

## Stop Loss Accumulation

The stop-loss accumulation batches accumulates the claim and ancillary transactions that are received from the members of a bill group, derives the SSL and ASL limits that are set on the respective pricing rules, calculates the stop-loss credits, and then creates the billable charges for SSL and ASL credits.

Until now, the **C1-BCSSL** and **C1-BCASL** batches were used to do the following after creating the billable charges for SSL and ASL, respectively:

- Update the billable charge ID on the transaction legs.
- Update the status of the transaction to **COMP**.
- Update the transaction aggregation criteria to **RITA** on the transaction calculation lines.

Now, the above activities (listed in bullets) are not performed through the **C1-BCSSL** and **C1-BCASL** batches, but are performed through the **C1-CMSSL** and **C1-CMASL** batches which are newly introduced in this release. Now onwards, you should execute the stop-loss batches in the following sequence:

1. C1-STAAD
2. C1-ACSSL
3. C1-BCSSL
4. C1-CMSSL
5. C1-ACASL
6. C1-BCASL
7. C1-CMASL

## Fully-Insured Pricing Rule Audit Process

A health plan can have approximately 50,000 individual memberships and it can be as large as 300,000 individual memberships in some cases. For the fully-insured individual business, the system enables you to define multiple pricing rules for the same price item using the same pricing rule type with overlapping date range having different pricing rule eligibility criteria. Based on the pricing rule eligibility criteria, whenever a pricing rule is added or updated, the system needs to trigger repricing for all eligible memberships. The **Audit Event Process Monitor (C1-AUDEV)** batch has significant performance impact when the number of memberships under a health plan is huge (say, greater than 100,000).

From this release onwards, the **Audit Event Process Monitor (C1-AUDEV)** batch will not process the audit events which are created for fully-insured pricing rules. Instead, the following two batches should be used to process the audit events which are created for fully-insured pricing rules:

- **C1-FIMRE** - The **C1-FIMRE** batch considers the audit events in the **Pending** or **Error** status. By default, it considers the audit events in the **Pending** status.

For the fully-insured group business, the system behaves in the following manner:

An audit event is created for...	Then...
An age-based or tier based pricing rule	<p>The system identifies the policy plan where the age based or tier based pricing rule is defined. Once the policy plan is identified, it extracts the active employee coverage, Medicare, and retiree memberships defined on the policy plan. An age-based or tier based pricing rule might invoke an additional charge or discount charge pricing rule when the related pricing rule eligibility criteria is met. If an additional charge pricing rule is defined as a related pricing rule for the age based or tier based pricing rule, the system checks whether the pricing type of the additional charge pricing rule is set to <b>Percent</b> or <b>Flat</b>. If the pricing type of the additional charge pricing rule is set to <b>Percent</b>, the system also creates an audit event for the additional charge pricing rule. However, if the pricing type of the additional charge pricing rule is set to <b>Flat</b>, no audit event is created for the additional charge pricing rule.</p> <p>If a discount charge pricing rule is defined as a related pricing rule for the age based or tier based pricing rule, the system checks whether the pricing type of the discount charge pricing rule is set to <b>Percent</b> or <b>Flat</b>. If the pricing type of the discount charge pricing rule is set to <b>Percent</b>, the system also creates an audit event for the discount charge pricing rule. However, if the pricing type of the discount charge pricing rule is set to <b>Flat</b>, no audit event is created for the discount charge pricing rule.</p>
An additional charge pricing rule	<p>The system checks whether the additional charge pricing rule is defined on the policy plan, policy, parent customer, or state. If the additional charge pricing rule is defined on the policy plan, it extracts a list of COBRA memberships defined on the policy plan.</p> <p>If the additional charge pricing rule is defined on the policy, it extracts a list of COBRA membership defined on all policy plans of the policy.</p>

An audit event is created for...	Then...
	<p>If the additional charge pricing rule is defined on the parent customer, it extracts a list of COBRA memberships defined on all policy plans of all policies where the parent customer is the policy holder. If the additional charge pricing rule is defined on the state, it considers the following:</p> <ol style="list-style-type: none"> <li>1. All the COBRA memberships which are issued in the respective state</li> <li>2. All the COBRA memberships of the policy plans which are issued in the respective state</li> <li>3. All the COBRA memberships of the policy plans on the policies which are issued in the respective state</li> </ol>
A discount charge pricing rule	<p>The system checks whether the discount charge pricing rule is defined on the policy plan, policy, or parent customer. If the discount charge pricing rule is defined on the policy plan, it extracts a list of retiree memberships defined on the policy plan. If the discount charge pricing rule is defined on the policy, it extracts a list of retiree membership defined on all policy plans of the policy. If the discount charge pricing rule is defined on the parent customer, it extracts a list of retiree memberships defined on all policy plans of all policies where the parent customer is the policy holder.</p>

Once the memberships are derived, the batch identifies the pricing rule type using which the pricing rule is created. It then creates a repricing entity detail record for each membership, pricing rule type, and effective date combination in the **CI\_REPRC\_ENTITY\_DTL** table. The status of the repricing entity detail record is set to **P**.

For the fully-insured individual business, the system behaves in the following manner:

An audit event is created for...	Then...
An age-based or tier based pricing rule	The system identifies the health plan where the age based or tier based pricing rule is defined. Once the health plan is identified, it extracts the Medicare and retiree memberships defined on the health plan which meets the pricing rule eligibility criteria. An age-based or tier based pricing rule might invoke a discount charge pricing rule when the related pricing rule eligibility criteria is met. If a discount charge pricing rule is defined as a related pricing rule for the age based or tier based pricing rule, the system checks whether the pricing type of the discount charge pricing rule is set to <b>Percent</b> or <b>Flat</b> . If the pricing type of the discount charge pricing rule is set to <b>Percent</b> , the system also creates an audit event for the discount charge pricing rule. However, if the pricing type of the discount charge pricing rule is set to <b>Flat</b> , no audit event is created for the discount charge pricing rule.
A discount charge pricing rule	The system checks whether the discount charge pricing rule is defined on the health plan. If the discount charge pricing rule is defined on the health plan, it extracts a list of retiree memberships defined on the health plan which meets the pricing rule eligibility criteria.

Once the memberships are derived, the batch identifies the pricing rule type using which the pricing rule is created. It then creates a repricing entity detail record for each eligible membership, pricing rule type, and effective date combination in the **CI\_REPRC\_ENTITY\_DTL** table. The status of the repricing entity detail record is set to **P**.

This batch is a multi-threaded batch. The multi-threading is based on the membership ID and chunks for multi-threading are created based on numerical distribution of membership ID.

- **C1-FIMRC** - The **C1-FIMRC** batch updates the status of the audit events which are processed through the **C1-FIMRE** batch. It should be executed immediately after executing the **C1-FIMRE** batch. If the repricing entity detail records are created successfully, the status of the audit event is set to **Complete**.

However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**. This batch is a multi-threaded batch. The multi-threading is based on the audit event ID and chunks for multi-threading are created based on numerical distribution of audit event ID.



You should specify the same parameters while executing both **C1-FIMRE** and **C1-FIMRC** batches. Now, you need to execute the following batches in the specified sequence when the audit events are created while adding or editing a fully-insured pricing rule:

1. C1-FIMRE
2. C1-FIMRC
3. C1-CBIPR (For inactivating a fully-insured pricing rule)
4. C1-REPC1
5. C1-REPC2
6. C1-REPC3 (For skip month calculation in case of fully-insured group business)
7. C1-FIBCR

While creating an active audit event type for the **C1-PricingRuleAgeBased**, **C1-PricingRuleTierBased**, **C1-PricingRuleCapitationFee**, and **C1-PricingRuleDiscount** business objects, you should not attach the **C1-AUDEVMPR** algorithm to the **Audit Event Processing** system event of the audit event type.

## User Interface (UI) Level Changes

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

Screen Name (in 3.1.0.0.0)	Changes
Deal Type	The following changes are made to this screen: <ul style="list-style-type: none"> <li>The <b>Days to Inactivate Deal</b> field is added in the <b>Main</b> section of the <b>Deal Type</b> zone.</li> </ul>
Deal Type (Used for Adding)	The following changes are made to this screen: <ul style="list-style-type: none"> <li>The <b>Days to Inactivate Deal</b> field is added in the <b>Main</b> section.</li> <li>The <b>Deal Inactivation</b> option is added in the <b>System Event</b> list.</li> </ul>
Deal Dashboard	The following changes are made to this screen: <ul style="list-style-type: none"> <li>The <b>Inactive</b> option is added in the <b>Status</b> list of the <b>Search Deal</b> zone.</li> <li>The icons do not appear in the <b>View Approval Workflow, Finalize Deal, Accept Deal, Reject Deal, Apply Back, and Review Deal</b> columns when a deal is inactivated.</li> </ul>
Deal Information	The following changes are made to this screen: <ul style="list-style-type: none"> <li>The <b>Template Deal</b> field is not available in the <b>Main</b> section when you create a deal.</li> <li>The <b>Save as Template</b> button is added in the <b>Deal</b> zone. It is enabled when the deal creator has the change access to the <b>C1-DEALTEMPLATE</b> application service.</li> <li>The <b>Adhoc Terms and Conditions</b> field is added in the <b>Terms and Conditions</b> section of the <b>Deal</b> zone.</li> <li>The <b>View</b> column is added in the <b>Terms and Conditions</b> grid of the <b>Deal</b> zone.</li> </ul>
Mapping Terms and Conditions	The following changes are made to this screen: <ul style="list-style-type: none"> <li>The <b>Adhoc Terms and Conditions</b> field is added in the <b>Deal-Specific Terms and Conditions</b> section.</li> <li>The <b>View</b> column is added in the <b>Deal-Specific Terms and Conditions</b> grid.</li> </ul>

Screen Name (in 3.1.0.0.0)	Changes
Hold Request Type	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Approval Required</b> field is renamed to <b>Activation Approval</b> in the <b>Hold Request Type</b> zone.</li> <li>• The <b>Approval To Do Role</b> field is renamed to <b>Activation Approval To Do Role</b> in the <b>Hold Request Type</b> zone.</li> <li>• The <b>Approval To Do Type</b> field is renamed to <b>Activation Approval To Do Type</b> in the <b>Hold Request Type</b> zone.</li> <li>• The <b>Release Approval</b>, <b>Release Approval To Do Role</b>, and <b>Release Approval To Do Type</b> fields are added in the <b>Hold Request Type</b> zone.</li> </ul>
Hold Request Type (Used for Adding)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Approval Required</b> field is renamed to <b>Activation Approval</b> in the <b>Main</b> section.</li> <li>• The <b>Approval To Do Role</b> field is renamed to <b>Activation Approval To Do Role</b> in the <b>Main</b> section.</li> <li>• The <b>Approval To Do Type</b> field is renamed to <b>Activation Approval To Do Type</b> in the <b>Main</b> section.</li> <li>• The <b>Release Approval</b>, <b>Release Approval To Do Role</b>, and <b>Release Approval To Do Type</b> fields are added in the <b>Main</b> section.</li> </ul>
Hold Request (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Approval in Progress</b> option is renamed to <b>Activation Approval in Progress</b> in the <b>Status</b> list.</li> <li>• The <b>Release Approval in Progress</b>, <b>Release Request Approved</b>, and <b>Return Release Request to Submitter</b> options are added to the <b>Status</b> list.</li> <li>• The <b>Refund</b> option is added to the <b>Hold Process</b> list.</li> </ul>
Hold Request (Used for Adding)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Use Selection Criteria</b> field is added in the <b>Main</b> section. It appears when the entity is set to <b>Account</b> while creating a hold request.</li> <li>• A new section named <b>Account Selection Criteria</b> is added to this screen. It appears when the <b>Use Selection Criteria</b> option is selected.</li> </ul>

Screen Name (in 3.1.0.0.0)	Changes
Hold Request (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• A new section named <b>Account Selection Criteria</b> is added to the <b>Hold Request</b> zone in the <b>Main</b> tab.</li> <li>• A new column named <b>Hold Refund Until</b> is added in the <b>Hold Entities</b> zone of the <b>Main</b> tab.</li> <li>• The <b>Division</b> and <b>Customer Class</b> fields are added in the <b>Filters</b> area of the <b>Hold Entities</b> zone.</li> <li>• The <b>Individual Membership Details</b> option is added in the <b>Search By</b> list of the <b>Search Account</b> zone.</li> <li>• The <b>Characteristic Type</b> and <b>Characteristic Value</b> fields are added in the <b>Search Criteria</b> section when you search for an account using the account details.</li> <li>• The <b>Entity ID</b> column in the <b>Search Results</b> section of the <b>Search Account</b> zone is renamed to <b>Account ID</b>.</li> <li>• The <b>Search</b> icon appears corresponding to the <b>State</b> field in the <b>Search Account</b> and <b>Search Bill</b> zones.</li> </ul>
Customer 360° Information	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Hold Details</b> zone is added in the <b>Account</b> tab.</li> </ul>
Refund/Write Off Request (Used for Searching)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Hold</b> option is added to the <b>Status</b> list.</li> </ul>
Account	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Auto Pay Review Required</b> field is added in the <b>Auto Pay</b> tab.</li> </ul>
Bill	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Eligible for Extraction</b> column is added in the <b>Auto Pay</b> tab.</li> </ul>
Specific Stop-Loss Pricing Rule (Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Rate Based</b> column is removed from the <b>Billable Charge Line Types</b> grid of the <b>Pricing Information for rule type:Ancillary</b> section. Instead, a new column named <b>Pricing Arrangement</b> is added in the grid.</li> </ul>
Aggregate Stop-Loss Pricing Rule (Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>• The <b>Rate Based</b> column is removed from the <b>Billable Charge Line Types</b> grid of the <b>Pricing Information for rule type:Ancillary</b> section. Instead, a new column named <b>Pricing Arrangement</b> is added in the grid.</li> </ul>

Screen Name (in 3.1.0.0.0)	Changes
Level-Funded Pricing Rule (Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Rate Based</b> column is removed from the <b>Billable Charge Line Types</b> grid of the <b>Pricing Information for rule type:Ancillary</b> section. Instead, a new column named <b>Pricing Arrangement</b> is added in the grid.</li> </ul>
Minimum Premium Program Pricing Rule (Bill Group)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Rate Based</b> column is removed from the <b>Billable Charge Line Types</b> grid of the <b>Pricing Information for rule type:Ancillary</b> section. Instead, a new column named <b>Pricing Arrangement</b> is added in the grid.</li> </ul>
Aggregate Stop-Loss Pricing Rule (Parent Customer)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Enrollment Based or Min ASL Limit (Available and Greater)</b> option is added in the <b>ASL Limit (During Policy Period)</b> and <b>ASL Limit (During Settlement Period)</b> lists of the <b>Accumulation Parameters</b> section.</li> <li>The <b>Enrollment Based or Minimum ASL limit (whichever is greater)</b> option in the <b>ASL Limit (During Policy Period)</b> and <b>ASL Limit (During Settlement Period)</b> lists is renamed to <b>Enrollment Based or Min ASL Limit (Greater)</b>.</li> </ul>

## Database Level Changes

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To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) which are newly introduced in Oracle Revenue Management and Billing Version 3.2.0.0.0, refer to the Appendix A: New Objects in the Oracle Revenue Management and Billing V3.2.0.0.0 Database in the *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 3.2.0.0.0 is supported:

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
Microsoft Windows 10 (64-bit) with Chromium Edge v83, Firefox ESR 78.x <sup>1</sup> , or Google Chrome Enterprise Version 81 or higher	AIX 7.2 TL0+ <sup>2</sup> (64-bit)	POWER 64-bit	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c
	Oracle Linux 7.x or 8.x (64-bit)	x86_64	Oracle WebLogic 12.2.1.4 (64-bit) IBM WebSphere 9.0.5.6	Oracle Database Server 19c
	Oracle Solaris 11.3+	SPARC 64-bit	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c
	Red Hat Enterprise Linux <sup>3</sup> 7.x or 8.x (64-bit)	x86_64	Oracle WebLogic 12.2.1.4 (64-bit) IBM WebSphere 9.0.5.6	Oracle Database Server 19c
	Microsoft Windows Server 2016+ (64-bit)	x86_64	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c

<sup>1</sup> Here, x represents the vendor supported version.

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

<sup>3</sup> Oracle Revenue Management and Billing is tested and certified on Oracle Linux 7.x and 8.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. For Oracle Linux 7.x, refer to the Oracle Lifetime Support Policy: Oracle and Sun System Software and Operating Systems document for the applicable end of support dates.

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



## Technical Recommendations

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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

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At present, we support upgrade from Oracle Revenue Management and Billing Version 3.1.0.0.0 to 3.2.0.0.0. For more information on how to upgrade, refer to the following documents which are available on OTN:

- *Oracle Revenue Management and Billing Version 3.2.0.0.0 Upgrade Path Guide*
- *Oracle Revenue Management and Billing Version 3.2.0.0.0 Upgrade Guide*

For upgrading from any other version of Oracle Revenue Management and Billing other than 3.1.0.0.0, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation or upgrade process.

## Unsupported Integrations

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We are not supporting Oracle Documaker integration with Oracle Revenue Management and Billing Version 3.2.0.0.0. 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. This reporting feature is built using native capabilities available in ORMB. For more information about the reporting feature, refer to 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*

# Oracle Utilities Application Framework Version 4.4.0.3.0 Enhancements

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For more information about the enhancements and deprecations made in Oracle Utilities Application Framework (OUAF) Version 4.4.0.3.0, refer to *Oracle Revenue Management and Billing Version 3.1.0.0.0 Release Notes*.

## Deprecation Notices for ORMB Version 3.2.0.0.0

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

- [Deprecation in This Release](#)
- [Deprecation Planned for Future Releases](#)

### Deprecation in This Release

None

### Deprecation Planned for Future Releases

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, C1-DUEDTFTCV, C1-AUDEVMPR				
Algorithm	C1-DUEDTFTCV, C1-AUDEVMPR				
Feature Configuration	C1_EX_ROUND				
Option Types	Currency Conversion Algorithm and Payment Distribution To-Do (from the <b>C1_MLTCURACC</b> 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, C1-CUSIN, C1-MEMIN, BILLING				
View	CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW				
Business Service	<p>C1-EffectivePricing, C1_PriceParmBS</p> <p><b>Note:</b> Instead of using the <b>C1-EffectivePricing</b> business service, use the <b>C1-GetEffectivePricing</b> business service to view the data on the <b>Pricing (Account)</b> and <b>Pricing (Person)</b> screens. Similarly, instead of using the <b>C1_PriceParmBS</b> business service, use the <b>C1_PRICE_PARM</b> business object to add, edit, copy, and delete a parameter.</p>				

<b>Object Type</b>	<b>Object Name</b>
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, Variance Parameter

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

## Product Documentation

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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 3.X.X.X.X Documentation Library) using the following URL:

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

# Media Pack Download


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Oracle Financial Services Revenue Management and Billing Version 3.2.0.0.0 and Oracle Insurance Revenue Management and Billing Version 3.2.0.0.0 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 3.2.0.0.0 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 the **Select** () icon corresponding to the **Oracle Financial Services Revenue Management and Billing 3.2.0.0.0** or **Oracle Insurance Revenue Management and Billing 3.2.0.0.0** option.
6. If required, you can verify the media pack which is selected by clicking the **View Items** link.
7. Click the **Continue** 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 entire 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 **Oracle Download Manager** window appears.
13. Browse to the location where you want to download the package and then click **Next**. 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
33689338	33357556	C1-TXNIP BATCH IS STUCK INTO IN PROGRESS STATUS
33688371	33541079	NO ERROR MESSAGE THROWN WHEN RATE OPTION IS BLANK IN PRICING RULE CREATION
33667236	33370464	BATCH RUN IS STUCK IN PRODUCTION
33664866	33320311	FILE MANAGEMENT SYSTEM UI   DOWNLOAD BUTTON NOT WORKING AS EXPECTED
33664446	33181847	ORMB 3.0.0.0 AFTER UPGRADE , WRITE OFF REQUEST UI FAILED WITH ERROR CHAR ENTITY MISSING
33664404	33456613	C1-PRTL-TNDR   TIME OUT WHILE SEARCHING TENDER DETAILS
33664081	33538500	ISSUE IN RULE CONFIGURATION
33663899	33284608	C1-APPOR BATCH JOB TAKES SEVERAL TO COMPLETE EXECUTION
33663877	33213513	IP BATCH EXCEPTION IN HANDLEAPPLICATIONERROR METHOD.
33663876	33280678	C1-APPOR BATCH JOB TAKES SEVERAL TO COMPLETE EXECUTION
33663351	33385652	ISSUE WITH FILE TRANSFORMATION BATCH (C1-FTRAN)
33663096	33368732	CHANGES FOR THREAD NOTIFICATIONS ARE NOT GETTING REFLECTED ON SCHEDULER PROGRAM SCREEN
33663071	33302117	ISSUE WITH FILE TRANSFORMATION BATCH (C1-FTRAN) WHILE
33663011	33443010	POST INSTALLATION OF PATCH 32804372 - UNABLE TO DISTRIBUTE PAYMENT.
33661780	33643431	UNABLE TO APPLY BILL WEIGHTED BY PRIORITY AND PERIOD (BILWPRPD) PAYMENT IN 3.0 ENVIRONMENT
33603972	33563159	TRANSACTION SERVICE (C1-TRANDTLSTAGEUPLOAD) FROM FILE UPLOAD NOT ABLE TO PROCESS LIST OF TRANSACTION
33438419	33371932	FORWARDPORTBUG 33371932 - UNABLE TO CREATE DEAL FOR MONASH CITY COUNCIL - PROMASTER MONTHLY CHARGES
33414252	33409636	DEAL TERMS AND CONDITION :- TERM AND CONDITION NOT SHOWING IN THE DEAL SCREEN
33405765	33405690	OVERDUE GETTING CANCELLED FOR ACCOUNT UNDER HOLD REQUEST WITH PAST END DATE
33399610	33360100	REFUND/WRITE OFF - APPROVAL REQUEST NOT GETTING ASSIGNED TO THE CORRECT THRESHOLD AMOUNT-TO DO ROLE
33399606	33360100	REFUND/WRITE OFF - APPROVAL REQUEST NOT GETTING ASSIGNED TO THE CORRECT THRESHOLD AMOUNT-TO DO ROLE
33399600	33360100	REFUND/WRITE OFF - APPROVAL REQUEST NOT GETTING ASSIGNED TO THE CORRECT THRESHOLD AMOUNT-TO DO ROLE

Bug Number	Copy of (Base Bug)	Description
33399596	33360100	REFUND/WRITE OFF - APPROVAL REQUEST NOT GETTING ASSIGNED TO THE CORRECT THRESHOLD AMOUNT-TO DO ROLE
32538305	-	PRICELIST 'COPY PRICING' FUNCTIONALITY NOT WORKING IN ORMB 2900
31184683	-	CLAIM PRICING RULE MARKDOWN CALCULATION INCORRECT
31075528	-	AFTER DESELECTING ANCILLARY FROM SSLPRICINGRULE (BG) ANCILLARY IS STILL GETTING ACCUMULATED
30053041	-	ASL ACCUMULATION NOT HAPPENING IF NO ENROLLMENT TRANSACTION RECEIVED ON THE CURRENT BILL PERIOD
33667784	33560450	PRICE LIST SIMULATION RESULTS ARE NOT DISPLAYED UNDER PRICE LIST SIMULATION VIEW
33663648	32158556	MISMATCH IN COLUMN LENGTH BETWEEN METADATA AND DATABASE TABLE FOR ENTITY_ID COLUMN
33663234	33388953	PRICE TREE NOT GETTING AUTOMATICALLY EXPANDED ON CLICKING ON BROADCAST BUTTON FOR PRICING - FORWARDPORT
33659569	33331000	INPUT REQUEST FOR EXCHANGE RATE API
33659495	33453927	HC INBOUND MESSAGE THROWS ERROR WHILE POPULATING NEW APAY IF OLD APAYS ARE TAGGED FOR BILL EXTRACT - FORWARDPORT
33659311	33564995	ISSUE WITH BLGEN BATCH FOR ACCRUAL RUN
33658889	33244234	INBOUNDMESSAGEUTILITIES_IMPL.PROCESSPRICINGRULEDATASQ - SQL STATEMENT NOT CLOSED - FORWARDPORT
33658878	33588610	HC-INBOUND - PERSON CHARACTERISTICS OF THE SAME TYPE WITH DIFFERENT VALUES AND DIFFERENT EFFECTIVE DATES ARE NOT ADDED - FORWARDPORT
33658863	33472425	UNABLE TO RECONCILE PAY INSTRUCTIONS FOR NON-COVERED SUBSCRIBERS - FORWARDPORT
33658845	33563031	PERSON ADDRESS UPDATE NOT WORKING AFTER APPLYING ROLL UP PATCHES - FORWARDPORT
33658824	33398933	ADDRESS ID STAMPED ON THE ACCOUNT PERSON ROUTING RECORD IS CAUSING INCORRECT BILL ROUTING ADDRESSES - FORWARDPORT
33650683	33421283	CONSTRUCT BILLING - ISSUE IF USAGE ACCOUNT IS EXCLUDED FROM SOME OTHER CONSTRUCT
33650519	32924401	PRICELIST APPROVAL MAKE CHECKER UI NOT LOADING DATA IN IE BROWSER
33639860	33564995	ISSUE WITH BLGEN BATCH FOR ACCRUAL RUN
33610366	33456731	UNABLE TO EDIT PRICE ASSIGNMENT WHEN PRICING IS LINKED WITH PENDING BILL
33610356	33427806	ORMB 2.9   PRODUCTION ISSUE   UNABLE TO END DATE PRICING VIA FRT
33610341	32778356	CURRENT TO-DO SECTION IS NOT GETTING REFRESHED

Bug Number	Copy of (Base Bug)	Description
33604915	33474487	UNABLE TO SEARCH PRICE ITEM ON THE PRICE ITEM PRICING PAGE - ORMB UPGRADE 3.0
33599296	33344890	SINCE DATE AND BIRTH DATE ARE NOT GETTING POPULATED FOR PARENT CUSTOMER THROUGH HEALTHCARE INBOUND
33599160	33552413	HISTORICAL PRICE LIST ASSIGNMENT SEARCH NOT WORKING FOR PERSON PRICE LIST ASSIGNMENT SCREEN
33599103	33513039	C1-FABL IS NOT ONLY PICKING UP THE ADHOC BILLABLE CHARGES. NORMAL BILLABLE CHARGES ARE ALSO CONSIDERED.
33599063	33463046	DUPLICATE COVERAGE ROW FOR SPOUSE IN CUSTOMER 360
33558935	33547565	RMB IS CREATING DUPLICATE BILL SEGMENTS AFTER PATCH APPLICATION
33546345	32856150	DISAGGREGATION BATCHES DOES NOT CONSIDER PRICE ITEMS PROVIDED IN DISAGGREGATION REQUEST
33515552	32706461	DELETE BUTTON IS NOT WORKING ON RATE DEFINITION SCREEN
33465425	33429295	TXNVP BATCH PERFORMANCE ISSUE - FORWARDPORT
33440036	33166408	ORMB 3.0 ON THE FEED MANAGEMENT DASHBOARD PAGE, WE ARE NOT ABLE TO BROADCAST SEARCHED FILE
33399432	33236842	STMPRD JOB RUNNING LONG
33390755	32909137	IN ORMB 2.8 THE ACCOUNT RECEIVABLE CENTRAL UI: HOLD AMOUNT IS SHOWING ZERO ALWAYS
33390670	33331093	EMAIL ADDRESS IS DELETED WHEN SUBSCRIBER IS UPDATED AND EMAIL IS NOT INCLUDED IN THE REQUEST
33390654	33144397	OFFSET REQUEST UI HISTORY BUTTON ISSUE FOR FILTERS
33390557	33272481	RETENTION TYPE BASED PRICING RULE - CHARACTERISTIC SECTION UI
33380864	31184683	CLAIM PRICING RULE MARKUP CALCULATION INCORRECT
33331823	32977274	CUSTOMER 360 VIEW - BILLED VS PAID SECTION DOES NOT SHOW POST RUNOUT WRITE OFF ADJUSTMENTS
33331671	32912624	#IAT#PRIORITY FIELD IN THE FILTER CRITERIA OF INCLUDE BILL SEGMENT IS NOT ACCEPTING MORE THAN 3DIGIT
33331597	32962918	META DATA FIELD DEFINITION UPDATE ISSUE IN C1_UPLOAD_REQ_DTLS TABLE

## Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 3.2.0.0.0 along with workarounds available to handle these issues. The known issues are grouped into the following categories:

- [Banking](#)
- [Insurance](#)
- [Documentation](#)

### Banking

Issue	<b>LOCALIZATION ISSUE WHEN MAKER AND CHECKER CHOOSE DIFFERENT LANGUAGES</b>
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	<b>FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS</b>
Description	The screens created using the UI map do not support the <b>Foreign Key Value</b> and <b>File Location Value</b> characteristic types. These screens only support the <b>Adhoc Value</b> and <b>Predefined Value</b> characteristic types.
Workaround	None

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

Issue	<b>C1-TXCNC BATCH GETS EXECUTED SUCCESSFULLY EVEN IF C1-TXNCU BATCH FAILS</b>
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"> <li>• Transaction Source</li> <li>• Division</li> </ul> <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	<b>CONDITIONAL APPROVAL WORKFLOW CANNOT BE USED WHILE COPYING A PRICE LIST</b>
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	<b>BILLS GENERATED FOR THE MEMBER ACCOUNT AND NOT FOR THE MASTER ACCOUNT</b>
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	<b>INCORRECT RESULTS IF DISAGGREGATION BATCHES NOT EXECUTED IN SEQUENCE</b>
Description	<p>During the transaction disaggregation process, you must execute the following batches in the specified order:</p> <ol style="list-style-type: none"> <li>1. Identify Affected Transactions (C1-IAENT)</li> <li>2. Process Non Aggregated Transactions (C1-PDTXN)</li> <li>3. Clean Up (C1-TXNCU)</li> <li>4. Update Disaggregation Request Status (C1-DARSU)</li> </ol> <p>Otherwise, erroneous results might occur.</p>
Workaround	None

Issue	<b>TWO CONCURRENT RUNS WHICH DERIVE SAME DIVISION FOR TRANSACTIONS DOES NOT WORK</b>
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	<b>ERROR OCCURS WHEN YOU DISPLAY BILL FOR A PRODUCT THAT BELONGS TWO RELATIONSHIPS</b>
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	<b>ACTIVE CONSTRUCTS DETERMINED ON CUT-OFF DATE INSTEAD OF CHARGES START &amp; END DATE</b>
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	<b>BILL SEGMENTS CREATED BUT FTS NOT CREATED WHEN ACCOUNTING CALENDAR NOT DEFINED</b>
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 <b>Bill</b> screen.
Workaround	None

Issue	<b>STATUS OF ALL LEGS CHANGED TO ERROR IF EXCHANGE RATE NOT AVAILABLE FOR ONE LEG</b>
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 <b>Error</b> .
Workaround	None

Issue	<b>INCORRECT RESULTS APPEAR WHEN UNDERSCORE CHARACTER IS USED IN SEARCH CRITERIA</b>
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	<b>PAYMENT AMOUNT IS INCORRECT WHEN PAYMENTS HAVE FROZEN &amp; OVERPAYMENT PAY SEGMENTS</b>
Description	If the payments have both frozen and overpayment pay segments, the payment amount displayed corresponding to the overpayment and frozen payment in the <b>Payments</b> zone of the <b>Remittance Summary</b> screen is incorrect. The system displays the total payment amount instead of displaying the overpayment and frozen pay segment amount.
Workaround	None

Issue	<b>ERROR OCCURS WHEN BIND VARIABLES USED IN IN AND NOT IN CLAUSES WITHOUT BRACKETS</b>
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	<b>PARTIAL DATA UPLOADED WHEN USAGE RECORD HAS MORE THAN FIVE PASS THROUGH CHARGES</b>
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	<b>ADJUSTMENT CREATED WHEN CONTRACT ID IS VALID, BUT ACCOUNT IDENTIFIER IS INVALID</b>
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	<b>ABLE TO GENERATE A BILL FOR A SETTLEMENT ACCOUNT FROM THE BILL SCREEN</b>
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 <b>Bill</b> screen.
Workaround	None

Issue	<b>ADJUSTMENT CREATED AGAINST PREVIOUS BILL IS NOT CONSIDERED DURING TRIAL BILLING</b>
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	<b>REOPEN BUTTON DISABLED WHEN C1-BILLSETT ALGORITHM ATTACHED ON CUSTOMER CLASS</b>
Description	If you attach an algorithm of the C1-BILLSETT algorithm type on the <b>Bill Completion</b> system event of the account's customer class, at present, you will not be able to reopen a bill.
Workaround	None

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

Issue	<b>PERFORMANCE ISSUE ON CHANGING THE SEARCH BY FILTER OPTION</b>
Description	If you change the filter option from the <b>Search By</b> 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	<b>EFFECTIVE PRICING NOT VISIBLE IF C1_PER_REL HAS INVALID PERSON RELATIONSHIP TYPE</b>
Description	If you set the <b>Check on Feature Configuration</b> parameter in an algorithm which is created using the <b>C1-CUSRLALGT</b> algorithm type to <b>A</b> and add an invalid person relationship type in the <b>C1_PER_REL</b> feature configuration, the effective pricing is not inherited properly as expected.
Workaround	None

Issue	<b>ERROR LOG FILES GENERATED ON EXECUTING BILLING AND C1-BLPPR BATCHES</b>
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"> <li>• BILLING</li> <li>• C1-BLPPR</li> </ul>
Workaround	None

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

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

Issue	<b>ELIGIBILITY CRITERIA ROW IS SKIPPED IF LEFT HAND SIDE PARAMETER IS NOT SPECIFIED</b>
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	<b>POST-PROCESSING BILL SEGMENT NOT REGENERATED WHEN YOU CLICK THE GENERATE BUTTON</b>
Description	An error occurs when you click the <b>Generate</b> button in the <b>Bill Segment</b> screen while regenerating the post-processing bill segment which is present on the pending bill.
Workaround	None

Issue	<b>RATE CALCULATED INCORRECTLY WHEN EXCHANGE RATE IS CHANGED DURING PRICING PERIOD</b>
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 <b>Pricing (Account)</b> screen might be incorrect when the exchange rate is different on the date when the results are fetched on the <b>Pricing (Account)</b> screen.
Workaround	None

Issue	<b>ENTRY NOT CREATED IN THE CI_REPRC_ENTITY_DTL TABLE ON EDITING A PRICE LIST</b>
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	<b>UNABLE TO DEFINE PARAMETER FOR FIELDS WHICH BELONG TO CHILD TABLES</b>
Description	At present, the system does not list the fields of child tables in the <b>Source Type Code</b> 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	<b>RATE NOT PERSISTED ON PRICE ASSIGNMENT DATE WHEN C1-PRICEACCOUNT INVOKED MANUALLY</b>
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	<b>PERSISTED DATA NOT GETTING REFRESHED ON EDITING PRICE ASSIGNMENT</b>
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	<b>PRICELIST EDIT VALIDATIONS NOT DEPENDENT ON ASSIGNMENT DATE OR ASSIGNMENT STATUS</b>
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	<b>STACKING IS NOT SUPPORTED FOR PRICE SIMULATION</b>
Description	Stacking is supported for bill generated through an Account. Pricing Simulation does not support stacking.
Workaround	None

Issue	<b>ADJUSTMENT AMOUNT IS NOT PICKED UP FOR PAYMENT IN NEXT BILL</b>
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	<b>SPLIT AUTO PAY NOT AVAILABLE ON SETTLEMENT CONSTRUCT ACCOUNT CREATION SCREEN.</b>
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	<b>SQL ERROR ON PRICE ASSIGNMENT SCREEN WITH ADHOC VALUE PASSED IN QUOTES.</b>
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	<b>BS ARE NOT GETTING PICKED FOR BATCH DATE AFTER BILLABLE CHARGE END DATE</b>
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	<b>RSDETAILS UPDATED INCORRECTLY WHEN PRICE COMPONENT FEES/RATE) PERSISTENCE EDITED</b>
Description	At present, rate schedule details after modification are displayed and not the details before editing.
Workaround	None

Issue	<b>FEES RATE CALCULATION PRE-PROCESSING ALGORITHM ISSUE</b>
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	<b>C1-ACFEES BATCH RUN WITH PRICE ITEM CODE AS THE ONLY PARAMETER.</b>
Description	C1-ACFEES batch should consider records of price assignment where FEES for same should persist.
Workaround	None

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

Issue	<b>C1-ACCOUNTFEES SERVICE ISSUE</b>
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	<b>PAYMENT STATUS REMAINS INCOMPLETE AND NO PAYMENT SEGMENT IS GENERATED EVEN WHEN TENDER CONTROL ID IS GENERATED</b>
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	<b>CHANGES MADE TO ACCOUNT ARE NOT UPDATED WHEN APPROVAL WORKFLOW IS ACTIVE FOR ACC</b>
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	<b>INBOUND WEB SERVICE DOES NOT TRIM LEADING &amp; TRAILING SPACES FROM INPUT PARAMETER</b>
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	<b>IF USER ADDED DEFER AUTO PAY DATE ON ACCOUNT THEN AUTO PAY WILL NOT WORK</b>
Description	If you manually add the date in the <b>Defer Auto Pay Date</b> field, the automatic payment functionality will not work for the account.
Workaround	None

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

Issue	<b>SEASONAL ADDRESS ID DOES NOT APPEAR IN THE BILL ROUTINGS TAB OF THE BILL SCREEN</b>
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 <b>Bill Routings</b> tab of the <b>Bill</b> screen. However, the seasonal address ID does not appear corresponding to the <b>Address ID</b> field.
Workaround	None

Issue	<b>ACCOUNT OVERRIDE ADDRESS IS NOT DELETED WHEN THE BILL ROUTING RECORD IS DELETED</b>
Description	Once you delete a bill routing record for a person from the <b>Account</b> screen where the <b>Address Source</b> field is set to <b>Account Override</b> , 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	<b>ERROR OCCURS ON USING A VALUE WITH HYPHEN FOR A CHARACTERISTIC TYPE</b>
Description	At present, an error occurs on a screen where a characteristic value with hyphen (-) is defined for a characteristic type.
Workaround	None

Issue	<b>AN ERROR OCCURS ON THE TEMPLATE SEARCH WINDOW</b>
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 <b>Search</b> icon corresponding to the respective field, the <b>Template Search</b> 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 <b>Template Search</b> window.
Workaround	None

Issue	<b>DISPUTE AMT AT BILL LEVEL INCORRECT WHEN BILL SEGMENT OF PREVIOUS BILL CANCELED</b>
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 <b>Dispute Details</b> zone is incorrect.
Workaround	None

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

Issue	<b>APAYCRET BATCH DOES NOT CONSIDER ECR ADJUSTMENTS CREATED ON PENDING BILL</b>
Description	You can only use an adjustment type where the <b>Print by Default</b> and <b>Impact Next Bill Balance</b> 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 <b>Automatic Payment Creation (APAYCRET)</b> batch creates automatic payment for the bill without considering the ECR adjustment.
Workaround	None

Issue	<b>SINGLE MATCH EVENT CREATED WHEN MULTIPLE BILL SEGMENTS OF A CONTRACT ARE NETTED</b>
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	<b>RECOGNITION SCHEDULE NOT GENERATED FOR BX/AX WHEN DRR FOR BS/AD DOES NOT EXIST</b>
Description	There might be situations when you have attached the <b>C1-REVRECSCH</b> 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	<b>AUTO PAY ID IS NOT UPDATED WHEN A REOPENED BILL IS COMPLETED</b>
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 <b>C1_FT_EXT</b> table. In addition, the entries in the <b>CI_BILL_ACH</b> table are not updated.
Workaround	None

Issue	<b>CUSTOMER SIMULATION NOT WORKING FOR CUSTOMER HAVING LARGE DATA</b>
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 <b>Customer</b> .
Workaround	Create a deal for such customers using the simulation type as <b>Deal</b>

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

Issue	<b>HIERARCHY UI-APPROVED PRICE ITEMS GETTING UNAPPROVED AGAIN IF RM CHANGES THE PRICING AND DOES THE SIMULATION AGAIN</b>
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 <b>Pending for Approval</b> while simulating the deal. But, the system changes the status of all price items in the deal to <b>Pending for Approval</b> .
Workaround	None

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

Issue	<b>SAME ORASEARCH ZONE APPEARS FOR MULTIPLE BIND VARIABLES WHILE DEFINING CONSTRUCT</b>
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	<b>INCONSISTENT DATA LENGTH FOR SRCH_CHAR_VAL AND ADHOC_CHAR_VAL</b>
Description	At present, the <b>ADHOC_CHAR_VAL</b> and <b>SRCH_CHAR_VAL</b> columns have different column length. The <b>SRCH_CHAR_VAL</b> column can only store 50 characters. Therefore, an adhoc characteristic value above 50 characters is truncated and then stored in the <b>SRCH_CHAR_VAL</b> 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	<b>ORASEARCH ICON FOR FK REF CHAR TYPE IS DISABLED IN AWB SCREENS</b>
Description	At present, the <b>Search</b> icon in the <b>Characteristic Value</b> 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	<b>Original and Proposed Revenue Not Calculated Correctly</b>
Description	At present, the original and proposed revenue of a price item are not calculated properly due to some rounding issue in the rate schedule API. Therefore, the average price of each price item, revenue of each account and customer, revenue from each product, division, and deal, and revenue variation calculated in a deal are not accurate.
Workaround	None

## Insurance

Issue	<b>OLD INSURANCE FEATURES ARE NOT TESTED AND VERIFIED IN ORMB VERSION 3.2.0.0.0</b>
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	<b>PERFORMANCE ISSUE WHILE CREATING DEFERRED REVENUE RECOGNITION SCHEDULE</b>
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	<b>VALIDATION FOR FIDUCIARY CONTRACT MISSING DURING RECONCILIATION</b>
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	<b>TWO BILL SEGMENTS GENERATED WHEN REASON CODE EFFECTIVE DATE IS SAME AS BILL SEGMENT START DATE</b>
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	<b>UNABLE TO DISTRIBUTE THE REMAINING PAYMENT MANUALLY</b>
Description	If you have distributed partial payment automatically through the <b>Payment by Transaction</b> screen, the system does not allow you to distribute the remaining payment manually.
Workaround	None

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

Issue	<b>CHARACTERISTIC TYPES ARE NOT FILTERED BASED ON THE REASON CODE</b>
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 <b>Reason Code</b> .
Workaround	None

Issue	<b>RECONCILIATION DOESN'T WORK PROPERLY FOR PASS THROUGH BILLABLE CHARGES</b>
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 <b>WD-Match</b> . However, at present, in case of pass through billable charges, the system changes the status of the reconciliation object line to <b>Manual</b> instead of <b>WD-Match</b> .
Workaround	None

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

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

Issue	<b>UNABLE TO SELECT AUDIT EVENT TYPE IN PRT WHEN UPDATE ALL IS CONFIGURED IN AET</b>
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 <b>Update All</b> 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 <b>Update All</b> option is not selected.

## Documentation

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

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

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

Issue	<b>CONTENT ADDED IN STEPRESULT AND INFO TAGS IS DISPLAYED IN BOLD</b>
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	<b>COMMENTS NOT COPIED IN MAIL WHILE SUBMITTING FEEDBACK TO THE DOCUMENTATION TEAM</b>
Description	The feedback entered in the <b>Comments</b> 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

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