

**Oracle Financial Services Revenue
Management and Billing**

OR

**Oracle Insurance Revenue
Management and Billing**

Version 7.0.0.0.0

Release Notes

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Oracle Financial Services Revenue Management and Billing/Oracle Insurance Revenue Management and Billing Version 7.0.0.0.0 Release Notes

Note: To improve the content readability, the above two products are collectively referred to as Oracle Revenue Management and Billing throughout this document.

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Preface

About this Document

This document describes the new features, enhancements, user interface 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.

Intended Audience

This document is intended for the following audience:

- End-Users
- System Administrators
- Consulting Team
- Implementation Team

Organization of the Document

The information in this document is organized into the following sections:

Section No.	Section Name	Description
Section 1	Prerequisites	Lists some prerequisites for the existing customers while upgrading to the ORMB Version 7.0.0.0.0.
Section 2	New Features (Generic)	Lists and describes the new features introduced in this release which can be used in both financial services and health insurance domains.
Section 3	New Features (Specific to Financial Services)	Lists and describes the new features introduced in this release which can be used in the financial services domain.
Section 4	New Features (Specific to Insurance)	Lists and describes the new features introduced in this release which can be used in the health insurance domain.
Section 5	Enhancements (Generic)	Lists and describes the enhancements made to the features that are used in both financial services and health insurance domains.
Section 6	Enhancements (Specific to Financial Services)	Lists and describes the enhancements made to the features that are used in the financial services domain.
Section 7	Enhancements (Specific to Insurance)	Lists and describes the enhancements made to the features that are used in the health insurance domain.

Section No.	Section Name	Description
Section 8	User Interface (UI) Level Changes	Lists the changes made to the existing screens in ORMB.
Section 9	Database Level Changes	States the documents that you can refer for different database level changes.
Section 10	Supported Platforms	Lists the operating system and application server combinations on which ORMB Version 7.0.0.0.0 is supported.
Section 11	Technical Recommendations	Provides recommendations to improve the overall batch performance on the Windows and Linux platforms.
Section 12	Supported Upgrades	Provides information about the supported step-by-step upgrade to the current release.
Section 13	Unsupported Integrations	Provides information about the integrations which are no longer supported in the current release.
Section 14	Oracle Utilities Application Framework Version 4.5.0.1.3 Enhancements	Lists and describes the enhancements made to the existing features in OUAF Version 4.5.0.1.3.
Section 15	Deprecation Notices for OUAF Version 4.5.0.1.3	Lists the features and system data that are deprecated in this release or planned for deprecation in the future release of OUAF.
Section 16	Deprecation Notices for ORMB Version 7.0.0.0.0	Lists the features and system data that are deprecated in this release or planned for deprecation in the future release of ORMB.
Section 17	Product Documentation	Provides information on how to access the ORMB documentation.
Section 18	Documentation Updates	Lists and describes any documentation updates.
Section 19	Media Pack Download	Provides instructions on how to download the release-specific media packs from Oracle Software Delivery Cloud.
Section 20	Bug Fixes	Lists the bugs that are fixed in this release.
Section 21	Known Issues	Lists and describes known issues in this release.
Section 22	Technical Support	Provides instructions on how to avail the technical support for ORMB.

Conventions

The following conventions are used across the document:

Convention	Meaning
boldface	Boldface indicates graphical user interface elements associated with an action, or terms defined in the text.
<i>italic</i>	Italic indicates a document or book title.
<code>monospace</code>	Monospace indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or information that an end-user needs to enter in the application.

Acronyms

The following acronyms are used in this document:

Acronym	Meaning
CMA	Content Migration Assistant
HSA	Health Savings Account
ILM	Information Lifecycle Management
LDAP	Lightweight Directory Access Protocol
OHC	Oracle Help Center
OIM	Oracle Identity Manager
ORMB	Oracle Revenue Management and Billing
OTN	Oracle Technology Network
OUAF	Oracle Utilities Application Framework
PDF	Portable Document Format
TFM	Transaction Feed Management
UAT	User Acceptance Testing
UI	User Interface

Related Documents

You can see the following documents for more information:

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">• Oracle Financial Services Revenue Management and Billing• Oracle Insurance Revenue Management and Billing <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 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 OUAF, information about OUAF 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>

Document Name	Description
<i>Oracle Utilities Application Framework Business Process Guide</i>	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.
<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 on 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>	<p>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.</p> <p>The features listed and described in this document can be used in both financial services and health insurance domains.</p>
<i>Oracle Revenue Management and Billing Administrative Guide</i>	<p>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.</p> <p>The information available in this document can be used in both financial services and health insurance domains.</p>

Document Name	Description
<i>Oracle Revenue Management and Billing Banking User Guide</i>	<p>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.</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 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>

Document Name	Description
<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>	Explains how to directly upgrade the ORMB database from 2.5.0.1.0 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.
<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>
<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.
<i>Oracle Revenue Management and Billing Information Lifecycle Management (ILM) Implementation Guide</i>	Provides an overview of the Information Lifecycle Management (ILM) feature. It describes how to implement ILM for the Transaction Feed Management (TFM) and Billing modules. It also provides detailed information about the ILM batches and their parameters.
<i>Oracle Revenue Management and Billing FOP Reports Guide</i>	Explains how to extract data from the system using various FOP reports in Oracle Revenue Management and Billing.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Change Log

Revision	Last Update	Updated Section	Comments
1.1	26-Aug-2024	Billable Charge Upload for Fully Insured Group and Individual Business	Added Information
		Policy Plan Level Charges	Added Information
		Membership Sponsor Charges	Added Information
		Invoice Request for Direct Billed Group Membership Accounts	Added Information
		Manual Regular Bill Generation Invoice Request	Added Information
		Manual Trial Bill Generation Invoice Request	Added Information
		Automatic Regular Bill Generation Invoice Request	Added Information
		Delinquency Management for Direct Billed Group Membership	Added Information
		Synchronize Membership Premium and Sponsored Benefit Bill Segment Generation Process	Added Section
1.2	04-Sep-2024	Mass Payment Tender Cancellation	Moved Section
		Synchronize Membership Premium and Sponsored Benefit Bill Segment Generation Process	Updated Information
		Reconciliation of Individual Medicare Benefits on Sponsor Account	Updated Information
		Automatic Regular Bill Generation Invoice Request	Updated Information
		Hold Request	Added Section
		Future Dated Policy Termination	Updated Information
		Split Billing with Employer Share Percentage	Updated Information
		Flat Per Subscriber Additional Charge	Updated Information
		Group Membership Lifecycle	Updated Information
		Inbound Message	Updated Information
		C1-MembershipRepricing Business Service	Added Section

Revision	Last Update	Updated Section	Comments
		Known Issues	Updated Information
1.3	05-Oct-2024	Preface	Updated Information
		Known Issues	Added Information
1.4	10-Oct-2024	Supported Platforms	Updated Information
1.5	27-Nov-2024	Support Division Group in Transaction Feed Management and Billing Batches	Added Information
		Division-Specific Price Item Description	Added Information
		Enabling Mandatory Field Indicator	Added Information
		Known Issues	Added Information
		Automatic Selection and Deselection of Interdependent Price Items	Added Section
		Setting Hierarchy in a Bespoke Price List	Added Section
		Multiple Price Item Pricing Selection	Added Section
		Badge Indicator for Floor and Ceil Breach at the RM Level	Added Section
		Automatic Selection and Deselection of Associated Price Items in Deal	Added Section
		Option to Update Deal Characteristics till Orchestration	Added Section
		Added Context Menu Option for Deal Creation and Search	Added Section
		Automatic Selection of Price Items with Non-Standard Price List Pricing and Historical Billable Charges	Added Section
		Add Characteristics in the Price Item Information String	Added Section
		Billable Charge Upload for Fully Insured Group and Individual Business	Updated Information
		Invoice Request for Direct Billed Group Membership Accounts	Updated Information
1.6	12-Mar-2025	Known Issues	Added Information

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Prerequisites

If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 7.0.0.0.0, 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 any previous version will not happen successfully.
- Transactions which are uploaded using any previous version 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)

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

- [Mass Payment Tender Cancellation](#)

Mass Payment Tender Cancellation

Until now, the system enabled you to cancel the payment from the user interface and through inbound web service using the payment event ID or payment ID. Now, the system enables you to cancel the payments through canceling a payment tender. The system provides the ability to perform mass payment tender cancellation through the **Upload Request** feature.

A new upload request type named **TNDR_CNCL_UPL_REQ_TYPE** is shipped with the product. You can upload a payment tender cancellation file in the CSV format using the **TNDR_CNCL_UPL_REQ_TYPE** upload request type.

The payment tender cancellation file should contain records with the following details – External Source ID, External Reference ID, Check Number, Tender Type, Tender Amount, Cancel Reason Code, Bank Code, Bank Account Key, Characteristic Type 1 to 5, Characteristic Value 1 to 5. The External Reference ID or Check Number is mandatory. It is used to identify the payment tenders which should be canceled using the given cancel reason.

Once you upload a payment tender cancellation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. If the mandatory data is missing in any record, the corresponding data record is created in the **Invalid** status.

On validating a data record, the system checks the following:

- Whether the payment tender is canceled
- Whether the payment event or payments associated with the payment tender are canceled
- Whether the payment is partially or fully refunded
- Whether the payment is in the **Freezable** or **Error** status

If any of the above condition is met, the status of the data record is changed to **Invalid**. However, if none of the above conditions are met, the status of the data record is changed to **Valid**. On processing a valid record, the system derives the payment event ID and then does the following:

- Cancels the payment tender using the given cancel reason
- Cancels the payment event and the corresponding payments

If the data record is successfully processed, the status of the data record is changed to **Processed**. However, if any error occurs while canceling the payment tender, the status of the data record is changed to **Error**. Once the payment tender is successfully canceled, the characteristics (if any) available in the data record are stamped on the payment tender.

To implement this feature, the following changes are made in the system:

- A new business object named **C1-TndrCnclUploadRequest** is introduced in this release.
- Three new algorithms named **C1-TND-DERIV**, **C1-TND-VALID**, and **C1-TND-PROC** are introduced in this release.

New Features (Specific to Financial Services)

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

- [Recurring and Non-Recurring Service Types](#)
- [Division-Specific Price Item Description](#)
- [Enabling Mandatory Field Indicator](#)
- [Mass Pricing and Commitments Update at the Deal and Deal Entity Levels](#)
- [Past Dated Deal Creation](#)
- [Support Division Group in Transaction Feed Management and Billing Batches](#)
- [Download and Upload Pricing of Child Customers and Accounts in a Deal](#)
- [Automatic Selection and Deselection of Interdependent Price Items](#)
- [Setting Hierarchy in a Bespoke Price List](#)
- [Multiple Price Item Pricing Selection](#)
- [Badge Indicator for Floor and Ceil Breach at the RM Level](#)
- [Automatic Selection and Deselection of Associated Price Items in Deal](#)
- [Option to Update Deal Characteristics till Orchestration](#)
- [Added Context Menu Option for Deal Creation and Search](#)
- [Automatic Selection of Price Items with Non-Standard Price List Pricing and Historical Billable Charges](#)
- [Add Characteristics in the Price Item Information String](#)

Recurring and Non-Recurring Service Types

Until now, you used to define various types of transactions or services in the system as the price items. And, while creating a charge for a service or transaction type (i.e., price item), you were able to specify whether the charge for the price item is recurring or non-recurring. Now, the system enables you to classify whether a service or transaction type (i.e., price item) is a recurring or a non-recurring price item. The system then allows you to inherit the recurring information from the price item while creating a charge for it. You can override the default recurring information of a price item during the billable charge creation, if required.

The following new fields are introduced while defining or editing a price item:

- **Charging Basis** – Used to indicate how you want to charge a price item, by default. The valid values are:
 - **Event Driven** – At present, this charging method is only used for the reporting purposes and there is no functionality attached to it.

- **One-Time** - At present, this charging method is only used for the reporting purposes and there is no functionality attached to it.
- **Recurring** – Used when you want to create a recurring charge for the price item.
- **Usage** - At present, this charging method is only used for the reporting purposes and there is no functionality attached to it.
- **Recurring Method** – Used to indicate whether the recurring bill segments for a charge must be created at the intervals defined in the bill period or at the set invoice frequency. The valid values are:
 - Bill Period
 - Frequency

This field appears only when you select the **Recurring** option from the **Charging Basis** list.

- **Bill Period** – Used to indicate the bill period that you want to use for specifying the intervals at which the recurring bill segments must be created. This field appears only when you select the **Bill Period** option from the **Recurring Method** list.
- **Invoice Frequency** – Used to indicate the invoice frequency at which the recurring bill segments must be created. This field appears only when you select the **Frequency** option from the **Recurring Method** list.

Now, when you create a billable charge for a price item from the user interface, the system will prompt whether you want to inherit the recurring information from the price item. Note that this happens only when the recurring information is defined for the respective price item before creating its billable charge. Depending on your response, the system may or may not inherit the recurring information from the price item. You can override the default recurring information in the billable charge, if required.

While creating a billable charge for a price item through various other mechanisms in the system, such as File Upload Interface, On Demand Billing, Billable Charge Upload Request, or Inbound Web Service, the system will inherit the recurring information from the price item (when defined) if it is not available in the record. Note that this happens only when the **C1-DFPIRECUR** algorithm is attached to the **Post-Processing** system event of the **C1-BILLCHARGE** business object.

To implement this feature, the following changes are made in ORMB:

- The following new fields are added to the **CI_PRICEITEM** table - **PI_CHARGE_TYPE_FLG**, **RECURRING_FLG**, **BILL_PERIOD_CD**, and **POLICY_INVOICE_FREQ_CD**.
- The above fields are also added in the following approval workflow UI maps - **C1-AppTxnPricItemDisplay**, **C1-AppTxnPricItemInput**, and **C1-RPCompareUI**.
- The **C1_PRICEITEM_BO** business object is accordingly updated to reflect the changes.
- A new lookup field named **PI_CHARGE_TYPE_FLG** is introduced in the system.
- A new algorithm named **C1-DFPIRECUR** is attached to the **Post-Processing** system event of the **C1-BILLCHARGE** business object.

Division-Specific Price Item Description

Oracle Revenue Management and Billing now enables you to define division-specific description for a price item. This helps to maintain a separate price item description for each division in the required language. The maximum length of division-specific price item description can be 100 characters.

To implement this feature, the following changes are made to the system:

- A new table named **CI_DIV_PRICEITEM_L** is introduced in this release.
- A new field named **Division Price Item Description** is available in the **Divisions** section while defining or editing a price item.
- The above field is also added in the following approval workflow UI maps – **C1-AppTxnPricItemDisplay**, **C1-AppTxnPricItemInput**, **C1-RPCompareUI**, **C1-DivisionAppTxnDisplay**, and **C1-DivisionAppTxnInput**.
- The **C1_PRICEITEM** and **C1_DIV_EXT** maintenance objects and the **C1_PRICEITEM_BO** and **C1_DIV_EXT_BO** business objects are accordingly updated to reflect the changes.
- A new column named **Division Price Item Description** is added in the **Price Item** tab of the **Division** screen. This column is non-editable.

Enabling Mandatory Field Indicator

Until now, the mandatory field indicator (i.e., the Asterisk symbol (*)) was not displayed in the user interfaces. This resulted in bad user experience and increased the lead time to complete a process in the application. Now, to overcome these issues, you can configure the system such that mandatory field indicator '*' is displayed for the required fields in the user interface.

To enable the mandatory field indicator for the required fields in the user interface, you need to set the [com.oracle.ouaf.ui.disableRequiredFieldIndicators](#) property in the [spl.template.properties](#) file to **False**. Note that, by default, the [com.oracle.ouaf.ui.disableRequiredFieldIndicators](#) property is set to **True**. On changing the value of this property from **True** to **False**, the mandatory field indicator (*) appears next to the required fields in the user interface.

On enabling the mandatory field indicator, the **Asterisk (*)** symbol appears corresponding to the required fields on almost all screens throughout the application. There is no way to disable it for a specific screen. However, there are some exceptions on enabling the mandatory field indicator:

- The **Asterisk (*)** symbol does not appear corresponding to the required fields in the **Search** portals or AWB pop-up windows.
- If a field is required for an algorithm program, the **Asterisk (*)** symbol does not appear corresponding to the respective field.
- The **Asterisk (*)** symbol does not appear corresponding to the required checkboxes whose data is stored as the Boolean value (i.e. True or False) in the database.

- There are some screens where the mandatory field indicator feature is not operational at present. We are working on such screens and it would be fixed in the upcoming releases. You can refer to the [36919824](#) bug for the list of such screens where the mandatory field indicator is not displayed at present.

Points to Note:

This configuration works as expected only when the **Style Sheet** option type of the **C1_UICONFIG** feature configuration is set to **c1/c1_cisDisabled.css**.

At present, this feature is tested and certified only for those user interfaces which are accessible to the financial services domain.

Mass Pricing and Commitments Update at the Deal and Deal Entity Levels

Until now, you had to individually update the pricing and commitments of the required price items for each entity in the deal. Now, the system provides you the ability to mass update the pricing and commitments of all the price items or the selected price items at the deal or deal entity level.

A new option named **Mass Update** is available in the **Pricing and Commitments** section of the **Pricing and Commitments** screen. It enables you to perform mass pricing and/or commitments update for either all the price items or the selected price items at the deal entity level. On clicking the **Mass Update** option, the following elements appear in the **Pricing and Commitments** section:

- **Apply to All/Selected Priceitem Toggle Button** – Used to indicate whether you want to mass update the pricing and commitments of all the price items or the selected price items.
- **Mass Price Update Slider Bar** – Used to increase or decrease the pricing in percentage for either all the price items or the selected price items. The range available for selection on the slider is from -100 to 500. Alternatively, you can specify the percentage value in the **Mass Price Update** field.
- **Mass Volume Update Slider Bar** - Used to increase or decrease the commitments in percentage for either all the price items or the selected price items. The range available for selection on the slider is from -100 to 500. Alternatively, you can specify the percentage value in the **Mass Volume Update** field.
- **Buttons such as Apply, Apply and Simulate, and Reset** – Used when you want to apply or reset the mass update changes.

On applying the changes, the system updates the proposed pricing and/or proposed commitments of either all the price items or the selected price items. Similarly, a new button named **Mass Update** is available in the **Customer Hierarchy** section of the **Deal Information** screen. On clicking the **Mass Update** button, a new screen named **Deal Level Mass Update** appears. It enables you to perform mass pricing and/or commitments update for the selected entities or price items at the deal level.

Past Dated Deal Creation

Until now, you were able to create current and future dated deals in the system. Now, the system provides the ability to create past dated deals from the user interface or through inbound web service. The system considers the price selection date during the following for a past dated deal or a deal version created using the **FLHR** option for a past dated deal:

- Copying the active or original price list assignments of an entity for the deal
- Copying the active or original effective pricing for the selected price items in the deal
- Copying the active or original product enrolments of an entity in the deal

However, the system considers the deal start date during the following for a past dated deal or a deal version created using the **FLHR** option for a past dated deal:

- Creating the proposed price list assignments for an entity in the deal
- Creating the proposed effective pricing for the selected price items in the deal
- Creating the proposed product enrolments for an entity in the deal

Support Division Group in Transaction Feed Management and Billing Batches

Oracle Revenue Management and Billing enables you to group one or more divisions into a geographic region or segment. This grouping can be based on various factors, such as business cut-off time, source data file availability and volume, etc. You can then process the source data of a geographic region or segment via a single job schedule. This is done with the objective to support data processing from multiple divisions in the same batch job, and thereby achieve maximum utilization of resources and improved business performance. Note that each division in the geographic region or segment is a stand-alone entity and can be processed in any order.

The **Division Group** screen was already introduced in the Oracle Revenue Management and Billing Version 6.1.0.0.0. You can now use the division group while executing the following transaction aggregation batches in the system:

- C1-TXNIP
- C1-TXNPS
- C1-TXNVP
- C1-TXNEX
- C1-TXNSQ
- C1-TXNCM
- C1-TXMCU

Similarly, you can use the division group while executing the following billing batches:

- BILLOPEN

- BSGENREG
- POSTPROC

The existing parameter named **Division** in the above TFM and Billing batches is enhanced to support both the division group and division. If you specify the value for the **Division** parameter, the system will first check whether it is a division group. If so, the system will perform the expected behaviour for all the divisions which belong to the division group. However, if the specified value is not a division group, the system will check whether it is a division and will accordingly perform the expected behaviour for the respective division. If you do not specify the value for the **Division** parameter, the system will perform the expected behaviour for all the divisions in the system.

Points to Note:

If the transaction aggregation cycle is started for a division (for example, D001), then you need to complete the cycle of the respective division before starting the new cycle for the same division (i.e., D001).

If the transaction aggregation cycle is started for a division group (for example, DG01), then you need to complete the cycle of the respective division group before starting the new cycle for the same division group (i.e., DG01).

If the transaction aggregation cycle is started for a division group (for example, DG02 which includes the D001 and D002 divisions), then you cannot start the new cycle for any division (i.e., D001 or D002) which belongs to the respective division group until the aggregation cycle of that division group is completed. Similarly, if the transaction aggregation cycle is started for a division (for example, D001 which is included in the DG01 division group), then you cannot start the new cycle for the DG01 division group until the aggregation cycle of the respective division (i.e., D001) is completed.

Download and Upload Pricing of Child Customers and Accounts in a Deal

Until now, when you created a deal for a customer using the simulation type as **Customer**, the system enabled you to download the pricing of only the main customer for which the deal is created. You were then able to update the main customer pricing for the deal in Excel and upload the same using the **Upload** button in the **Deal Information** screen. In other words, the system supported the download and upload pricing feature only on the deal entity and not for its direct accounts and child customers in the hierarchy.

Now, the download and upload pricing features are enhanced to support the following:

- All the entities in the customer hierarchy
- Single entity in the deal

On clicking the **Download Pricing** button, you can download the pricing of all the entities (including direct accounts of a customer and its child customers and their accounts) in the deal. The downloaded file will be named as model_id.xls. The entities would be listed in the Excel in the following sequence:

1. Entity on which deal is created.
2. Direct and prospect accounts of the deal entity.

3. One of the child persons of the deal entity and then its direct and prospect accounts. It is then followed by one of its child persons (i.e. grandchild person of the deal entity) and then the grandchild person's direct and prospect accounts. This continues till the complete hierarchy of the child person is listed.
4. Next child person of the deal entity and then its direct and prospect accounts. It is then followed by one of its child persons (i.e. grandchild person of the deal entity) and then the grandchild person's direct and prospect accounts. This continues till the complete hierarchy of the child person is listed.
5. This continues till all the child persons of the deal entity are listed in the Excel.

You can then edit the pricing and commitments of the required entities in the deal and upload the changes made in the Excel using the **Upload Pricing** button.

The system also provides the ability to download the pricing of a particular entity in the deal. A new option named **Download Pricing and Commitment** is added in the **Action** list. The downloaded file will be named as rmb_entity_id.xls. You can then edit the pricing and commitments of the entity in the deal and upload the changes made in the Excel using the **Upload Pricing** button.

To implement this feature, the following changes are made to the system:

- A new column named **Parent/Main Person ID** is added to the MODEL_ID worksheet. It displays the parent of the child person. If there are multiple parents for a child person, the system will show only one parent randomly. If there is no parent person, this column would be blank.
- The sequence in which the price assignment ID is listed for a particular entity in Excel depends on the level score assigned to the price assignment ID.
- Two new parameters named **ACCT_ID** and **PER_ID** are added to the **DLDWLD** report.

Automatic Selection and Deselection of Interdependent Price Items

While creating a deal for an entity, you need to select the required price items for the deal from those which are assigned to the person or account in the customer hierarchy. Now, the system automatically selects the interdependent price items when you manually select one price item from the predefined group of interdependent price items within the deal.

A new extendable lookup business object named **C1-DealPriceitemDependency** is shipped with the product. It allows you to group a set of price items (along with its pricing parameters) which are dependent on each other for a division by adding an extendable lookup value. Once the extendable lookup value is created, you need to attach an algorithm created using the **C1-DLPRASLDL** algorithm type to the **Price Item Selection Post Processing** system event of the required deal types.

Note: The **C1-DLPRASLDL** algorithm type is shipped with the product. You need to create an algorithm using the **C1-DLPRASLDL** algorithm type. While creating the algorithm, you need to set the **Dependency Value** parameter to the extendable lookup value that is created using the **C1-DealPriceitemDependency** extendable lookup business object.

On creating a deal using a deal type where the **C1-DLPRASLDL** algorithm is attached, the system automatically selects the interdependent price items when one price item from the predefined group (i.e., extendable lookup value) is selected in the **Price Item Selection** screen. Note that the automatic selection (if any) happens only when you click the **Save** or **Save and View Pricing and Commitments** button. Similarly, if you deselect a price item of the predefined group from a deal, the system will automatically deselect the other interdependent price items of the predefined group from the deal.

Setting Hierarchy in a Bespoke Price List

If you opt to create a bespoke pricing for the customers and accounts when a non-contracted deal is orchestrated, the system does the following:

1. Ends the existing agreed or price list pricing of an entity which is overridden or edited in the deal.
2. Creates a bespoke price list with the new price assignments and assigns the bespoke price list to the respective entity.

Until now, by default, the **Price List Inheritance** field was set to **No** in the bespoke price list. As a result, if you wanted to leverage the price list for another entity, you had to explicitly attach both the standard and bespoke price lists to the entity. In other words, you had to attach two price lists (viz. the bespoke price list and the standard price list) to consider the pricing for the price items in the bespoke price list as well as in the standard price list.

Now, the system automatically creates a price list hierarchy in the bespoke price list. A new algorithm type named **C1-PLUPBPK** is shipped with the product. If you create an algorithm using the **C1-PLUPBPK** algorithm type and attach it to the **Bespoke Price List Post Processing** system event of the required deal types, the system does the following on creating a bespoke price list:

- Sets the **Price List Inheritance** field of the bespoke price list to **Yes**.
- Adds the price list whose pricing was overridden or edited in the deal as the parent price list in the bespoke price list hierarchy.

Note: The priority of the bespoke price list will be set as mentioned in the **Bespoke Price List Creation during Deal Orchestration** section of the *Oracle Revenue Management and Billing Banking User Guide*.

As a result, the system will first check whether the pricing for a price item is available in the bespoke price list assigned to the entity. If the pricing is not available for a price item in the bespoke price list, the system will check whether the pricing for a price item is available in the standard price list that is assigned as a parent in the bespoke price list. If so, the system will inherit the pricing for the price item from the parent price list (i.e. from the standard price list). However, if the pricing for a price item is not available in the standard price list, then the system will check whether the pricing for a price item is available in the assigned price list with the next subsequent priority. If so, the system will inherit the pricing for the price item from the assigned price list with the next subsequent priority.

Multiple Price Item Pricing Selection

Until now, you were able to add an additional price item or price item pricing in the deal. If you wanted to add two or more additional price items in the deal, you had to add them one by one. Now, the system enables you to add multiple additional price items at the same time in the deal. To implement this feature, the following changes are made to the system:

- A new option named **Multiple Price Item Pricing Selection** is available in the **Action** list at the parent level in the **Entity Hierarchy** section of the **Deal Information** screen.
- A new screen named **Price Item Pricing Selection** is introduced in this release. It appears on clicking the **Multiple Price Item Pricing Selection** option from the **Action** list. It enables you to select one or more price item pricing at once which is assigned to a price list, person, or account in the system. It displays the price item pricing in the hierarchical manner (i.e., first root level hierarchy entity and then non root level hierarchy entity followed by the price item). You can manually select or deselect at any price item hierarchy level. In addition, this screen indicates the following:
 - Whether the price item is already selected in the deal.
 - Whether the price item is already assigned in the customer hierarchy of the deal, but not yet selected in the deal.
- A new option type named **Assignment Limit for Multiple Price Item Pricing Selection** is added in the **C1-Deal** feature configuration. It enables the system to determine the maximum number of price item pricing (assigned to a price list, person, or account) that you can add at once in the deal. If the number of price item pricing selected exceeds the specified count, an error occurs indicating that you cannot add more than the specified count at once in the deal. This helps to improve the system performance. You can repeat the action multiple times until all the required price items are assigned at the parent level in the deal.

On adding a price item pricing to the deal, the system creates a customer or account agreed proposed pricing for the respective price item at the parent level in the deal. If the price item is already assigned at the parent level in the deal, the system will override the existing pricing in the deal.

Badge Indicator for Floor and Ceil Breach at the RM Level

Oracle Revenue Management and Billing provides the ability to understand whether the pricing for a price item is within the relationship manager's floor and ceil range or not using a badge indicator. If the pricing for a price item is within the relationship manager's floor and ceil range, the system shows the green badge in the **Price Item Hierarchy** column of the **Pricing and Commitments** screen. However, if the pricing for a price item is not within the relationship manager's floor and ceil range, the system shows the red badge in the **Price Item Hierarchy** column of the **Pricing and Commitments** screen. The badge indicator is added for all the selected price items in the deal after simulation and is then visible throughout the lifecycle of the deal.

Automatic Selection and Deselection of Associated Price Items in Deal

Until now, when you selected one of the associated price items which offer relationship-based pricing in the **Price Item Selection** screen, an error occurred on clicking the **Save** or **Save and View Pricing and Commitments** button indicating that you need to select all the price items which are associated to offer relationship-based pricing in the deal. Now, when you select one of the associated price items which offer relationship-based pricing in the **Price Item Selection** screen, the system provides the ability to automatically select other associated price items in the deal. To enable the automatic selection of associated price items in a deal, a new option type named **Auto Selection of Related Price Items** is introduced in the **C1-Deal** feature configuration. If you set the value of the **Auto Selection of Related Price Items** option type to **Y**, the system automatically selects other associated price items when one price item from the associated price items is selected in the **Price Item Selection** screen.

Note that the automatic selection (if any) happens only when you click the **Save** or **Save and View Pricing and Commitments** button. Similarly, if you deselect an associated price item from a deal, the system will automatically deselect all the other associated price items from the deal.

However, if you set the value of the **Auto Selection of Related Price Items** option type to **N** or if you do not set the **Auto Selection of Related Price Items** option type in the **C1-Deal** feature configuration, the system will behave in the traditional manner (i.e., an error occurs when all the associated price items are not manually selected in the deal).

Option to Update Deal Characteristics till Orchestration

Until now, the system enabled you to add or update the deal characteristics only when the deal was in the **Pending Simulation** or **Simulated** status. Now, the system enables you to add or update the deal characteristics until the deal is orchestrated.

Added Context Menu Option for Deal Creation and Search

Until now, while creating a deal, you had to first search for the person, account, or prospect in the **Search Entity** zone of the **Deal Information** screen and then add the deal details in the **Deal** zone. Now, a new sub menu option named **Go To Deal** is added in the context menu corresponding to the person or account in the **Search Results** section of the **Customer 360° View** screen as well as in the **Customer 360° Information** screen. This sub menu has the following two options:

- **Search** - On clicking the **Search** option, the **Deal Dashboard** screen appears with the list of deals created for the corresponding person or account in the **Search Deal** zone. The **Search Results** section will show no results when no deals are defined for the corresponding person or account in the system.

- **Add** - On clicking the **Add** option, the **Deal Information** screen appears where you can define a deal for the corresponding person or account. The person or account details are automatically populated in the **Deal** zone.

Automatic Selection of Price Items with Non-Standard Price List Pricing and Historical Billable Charges

Oracle Revenue Management and Billing enables you to configure the system such that price items with non-standard price list pricing and/or with historical billable charges are automatically selected in a deal. In other words, whenever you have a non-standard price list assigned to an entity in the customer hierarchy or when you assign a non-standard price list in a deal, the system can automatically select the following in a deal:

- Price items with the non-standard price list pricing
- Price items with the billable charges

Note that the automatic selection happens whenever the **Price Item Selection** screen appears. To implement this feature, a new algorithm type named **C1-DLAUSL** is shipped with the product. To enable this feature, you need to create an algorithm using the **C1-DLAUSL** algorithm type and attach it to the **Price Item Group List Filter** system event of the required deal types.

While creating the algorithm using the **C1-DLAUSL** algorithm type, you need to specify the following parameters:

- **Price Item Selection Criteria:** Used to indicate the price items that you want to automatically select in a deal. The valid values are:
 - **BESP** – Used when you want to automatically select price items with the non-standard price list pricing. The system considers the price items from both the non-standard price list which is already assigned to an entity in the customer hierarchy and the non-standard price list which is manually assigned in the deal.
 - **BCHG** – Used when you want to automatically select all the price items for which the billable charges exist in the system.
 - **BOTH** – Used when you want to automatically select both the price items with the non-standard price list pricing and the price items with the billable charges (i.e., with usage).
- **Exclusion Char Type:** Used to specify the characteristic type. It indicates whether the price item should be displayed in the **Price Item Selection** screen or not. Here, you must specify a characteristic type where the characteristic entity is set to **Price Item**. Also, this characteristic type should be a predefined characteristic type with the valid values as **Yes** and **No**.
- **Selection Type Flg:** Used to control how the check box should be displayed corresponding to the price items which are automatically selected based on the price item selection criteria in the **Price Item Selection** screen. The valid values are:
 - **OPTL** – Used to indicate that the system should not, by default, select the check box corresponding to the price item in the **Price Item Selection** screen. Note that, in such case, the check box is editable.

- **STND** – Used to indicate that the system should, by default, select the check box corresponding to the price item in the **Price Item Selection** screen. Note that, in such case, the check box is editable.
- **MNDT** – Used to indicate that the system should, by default, select the check box corresponding to the price item in the **Price Item Selection** screen. Note that, in such case, the check box is non-editable.

Note: You can anytime deselect the price items, which are automatically selected based on the price item selection criteria, from the **Price Item Selection** screen.

Add Characteristics in the Price Item Information String

Oracle Revenue Management and Billing now provides you with the ability to display the required price item characteristics and division-specific price item characteristics in the price item information string. The **C1-PIINFO** algorithm type is enhanced to meet this business requirement. You can specify the required characteristic types in the **C1-PIINFO** algorithm in the below given format:

Characteristic Type	Format
Price Item Characteristic	CHAR_TYPE=<CHARACTERISTIC_TYPE>
Division-Specific Price Item Characteristic	DIVCHAR_TYPE=<CHARACTERISTIC_TYPE>

Note that the price item characteristics appear in the price item information string throughout the application. However, the division-specific price item characteristics appear in the price item information string only within the **Deal Pricing Management** module.

If you have specified the required price item characteristic and division-specific price item characteristic in the **C1-PIINFO** algorithm, the system will concatenate the characteristic information in the price item information string in the below format:

<PRICE_ITEM_CHAR_TYPE>:< PRICE_ITEM_CHAR_VALUE>

<DIV_PRICE_ITEM_CHAR_TYPE>:< DIV_PRICE_ITEM_CHAR_VALUE>

For example, SEPADDR, SEPA Direct Debit Return, California, Automated Recurring Charges:Yes, Aggregate Service Quantity:Average

Where, **SEPADDR** is the price item code, **SEPA Direct Debit Return** is the price item description, **California** is the division to which the price item belongs, the **Automated Recurring Charges** characteristic is a price item characteristic, and the **Aggregate Service Quantity** characteristic is a division-specific price item characteristic.

If the price item characteristic type or division-specific price item characteristic type given in the **C1-PIINFO** algorithm is not defined for a price item, the system will not display the characteristic in the respective price item information string.

Earlier, if the information for the price item was not available, the system used to retain the placeholder separated by the given separator. For example, SEPADDR, SEPA Direct Debit Return, **California, , Pricing**. Now, this issue is fixed. If the information for the price item is not available, the system will not concatenate the respective data in the price item information string. For example, now the above price item information string will be shown as SEPADDR, SEPA Direct Debit Return, California, Pricing.

New Features (Specific to Insurance)

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

- [Benefit Passthrough Charges VS Calculated Charges](#)
- [Automatic Offset of Debit and Credit Bill Line Items](#)
- [Flat Per Subscriber Additional Charge](#)
- [Rounding Premium at the Member Level](#)
- [Support Open Ended Policies, Plans, Pricing Rules, and Memberships](#)
- [Policy Cancellation through a Health Care Inbound Message](#)
- [Policy Plan Cancellation through a Health Care Inbound Message](#)
- [Reconciliation of Individual Medicare Benefits on Sponsor Account](#)
- [Individual Membership Benefits](#)
- [Future Dated Policy Termination](#)
- [Billable Charge Upload for Fully Insured Group and Individual Business](#)
- [Policy Plan Level Charges](#)
- [Membership Sponsor Charges](#)
- [Invoice Request for Direct Billed Group Membership Accounts](#)
- [Delinquency Management for Direct Billed Group Membership](#)
- [Synchronize Membership Premium and Sponsored Benefit Bill Segment Generation Process](#)

Benefit Passthrough Charges VS Calculated Charges

Until now, the system enabled you to compare the calculated benefit amount against the externally priced (i.e. passthrough) benefit amount. And, if the calculated benefit amount was not within the minimum amount (i.e. received benefit amount – threshold amount) and maximum amount (i.e. received benefit amount + threshold amount) range, the system created a To Do using the given To Do type and then added the To Do in the respective membership log.

Now, the system enables you to bill either the calculated benefit amount or passthrough benefit amount for a membership depending upon the business requirements. To implement this feature, the following changes are made to the system:

- A new option named **Compare Premium** is introduced while defining or editing a benefit sub type.
- A new characteristic type named **C1BILLMD** is introduced in this release.
- A new algorithm named **C1-BNFTENTY** is attached to the **Audit** system event of the **C1-IndMembership** and **C1-Benefits** business objects.

To bill either the calculated benefit amount or passthrough benefit amount for a membership, you need to do the following:

- Select the **Compare Premium** option in the respective benefit sub type.
- Specify the price item (i.e. validate price item) in the respective benefit sub type. Here, you must specify the price item that is added in the primary pricing rule type (associated with the health plan) using which the premium is calculated for the membership.
- Define the **C1BILLMD** characteristic type for the validate price item. You can set it to either of the following:
 - **PREMIUM** – Used when you want to bill the calculated benefit amount for the membership.
 - **PASSTHROUGH** - Used when you want to bill the passthrough benefit amount for the membership.

If the repricing entity detail record is created for the primary pricing rule type (used for calculating membership premium) and the repricing entity detail record does not exist for the benefit pricing rule type with the same effective date, then the **C1-BNFTENTY** algorithm creates the repricing entity detail record for the benefit pricing rule type, individual membership, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the benefit repricing entity detail record is set to **Pending**. This happens whenever the membership is audited, and the **Compare Premium** option is selected in the respective benefit sub type. Similarly, if the repricing entity detail record is created for the benefit pricing rule type (used for calculating membership benefit) and the repricing entity detail record does not exist for the primary pricing rule type with the same effective date, then the **C1-BNFTENTY** algorithm creates the repricing entity detail record for the primary pricing rule type, individual membership, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the premium repricing entity detail record is set to **Pending**. This happens whenever the membership benefit is audited, and the **Compare Premium** option is selected in the respective benefit sub type.

On executing the **C1-REPC2** batch, the system updates the status of the following:

- Premium repricing entity detail record to **Invalid** when the **C1BILLMD** characteristic on the validate price item is set to **PASSTHROUGH**
- Benefit repricing entity detail record to **Invalid** when the **C1BILLMD** characteristic on the validate price item is set to **PREMIUM**

A new screen named **Pricing Vs Passthrough Charges** is introduced in this release. It is accessible from the **Report and Inquiry** menu. It enables you to view the difference (if any) between the calculated and passthrough benefit amount of a membership.

Automatic Offset of Debit and Credit Bill Line Items

Oracle Revenue Management and Billing facilitates you with the auto maintenance process for accounts wherein the system will automatically offset the debit and credit bill line items of the accounts. The auto maintenance process is driven using the **Offset Request** feature ensuring that the match events are created at the bill line item level.

Until now, this feature was tested and certified for the fully insured individual line of business. Now, this feature is enhanced to support the fully insured group and fully insured group direct billed membership lines of business. In other words, the system will automatically offset the debit and credit bill line items of the parent customers', bill groups', and direct billed memberships' accounts. For more information, refer to the **Automatic Offset of Debit and Credit Bill Line Items** section in the *Oracle Revenue Management and Billing Insurance User Guide*.

Flat Per Subscriber Additional Charge

Group health insurance plans, such as High deductible Health Plans, have the Health Savings Account (HSA) linked to it. Every HSA is charged a flat administrative fee per coverage per month. Now, the system enables you to create a flat charge per subscriber per month to facilitate the above business requirement. To implement this feature, the following changes are made to the system:

- The existing additional charge pricing rule type business object named **C1-PrcRuleTypeCapitationFee** is enhanced such that it now enables you to create:
 - A primary flat charge pricing rule type
 - A related pricing rule type which depends on the premium amount for calculation of an additional charge
- The **Pricing Rule Type Sub Category** field no longer appears while defining or editing an additional charge pricing rule type. The system, by default, sets the pricing rule type sub category to **Per Subscriber** when you set the category in the pricing rule type to **Additional Charge**.

While defining a primary or related additional charge pricing rule type, you must attach the following algorithms to the respective system event:

System Event	Algorithm
Account and Price Item Derivation	C1_ACCPRIMEM
Bill Group Derivation	C1_MEMBGDRV
Premium Calculation	C1_TIERPREM
Account and Price Item Derivation Post-Processing	C1-BILLPDRV
Account and Price Item Derivation Post-Processing	C1-BILLRPCR
Pricing Rule Proration Amount Calculation	C1-TIERPRFC
Billable Charge Creation Post-Processing	C1-FICRETBC

Rounding Premium at the Member Level

Until now, the system rounded off the amount at the billable charge level and not at the member level in the billable charge. The business had observed rounding discrepancy in certain cases, such as premium proration, etc. To resolve the rounding issue, a new option type named **Round Member Premium** is added in the **C1-ASOBLLNG** feature configuration. It is used to determine whether the system should round off the amount at the member level in the billable charge or at the billable charge level. The valid values are **Y** or **N**. Note that this option type is applicable for the fully insured group and fully insured individual lines of business.

Support Open Ended Policies, Plans, Pricing Rules, and Memberships

Oracle Revenue Management and Billing enables you to maintain open-ended policies, policy or health plans, pricing rules, and group and individual memberships wherein you can specify far-fetched end dates for them. To support the open-ended group and individual memberships, the following changes are made to the system:

- All the group and individual memberships would be auto renewed by the system based on the given renewal period.
- Two new option types are added in the **C1-ASOBLLNG** feature configuration:
 - **Number of months in advance for Open-Ended Renewal** - Used to indicate the number of months in advance you want to automatically renew the group and individual memberships. You must specify a positive value for this option type.
 - **Renewal period for Open-Ended Membership** – Used to indicate the period (i.e. number of months) for which you want to automatically renew the group and individual memberships. You must specify a positive value for this option type. The system will then set the end date of the group memberships to the policy start date + renewal period – number of months in advance for open-ended renewal. Similarly, the system will then set the end date of the individual memberships to the membership start date + renewal period – number of months in advance for open-ended renewal.
- A new column named **ENRL_END_DT** is introduced in the **CI_MEMBERSHIP**, **CI_MEMBERSHIP_PER**, and **C1_BENEFITS** tables.
- A new column named **OPEN_ENDED_SW** is introduced in the **CI_MEMBERSHIP_PROCESS** table.
- The **enrlEndDate** tag is added for membership and membership person in the **C1-Membership** business object schema.
- The **autoRenew** and **contractPeriod** tags are added for membership in the **C1-Membership** business object schema.
- The **enrlEndDate** tag is added for membership and membership person in the **C1-IndMembership** business object schema.
- The **enrlEndDate** tag is added for benefit in the **C1-Benefits** business object schema.

- A new parameter named **Open Ended Membership** is added in the **C1-MEPRC** batch. It is optional. It is used when you want to process only open-ended memberships and automatically renew them for the given renewal period.

From now onwards, the end date of the group or individual membership received from the source system through an inbound message will be stored in the **ENRL_END_DT** column. The system will stamp the auto renewal end date in the **END_DT** column and will use it for the membership premium calculation. The system will display the date from the **ENRL_END_DT** column for the membership and membership person in the **Membership** screen.

Now, when a group or individual membership is created through a health care inbound message, the system checks whether the renewal period for open-ended membership (specified in the **C1-ASOBLLNG** feature configuration) is less than the membership period. If so, the system does the following:

- Sets the end date of the membership and membership person to policy start date or individual membership start date + renewal period – number of months in advance for open-ended renewal.
- Sets the enrolment end date to the date specified in the **endDate** tag of the inbound message.
- Sets the **AUTO_RENEW_SW** field to **Y** and the **CONTRACT_PERIOD** field to the renewal period.
- Sets the **PROCESS_DT** column of the **CI_MEMBERSHIP_PROCESS** table to the end date of the membership.
- Sets the **OPEN_ENDED_SW** column of the **CI_MEMBERSHIP_PROCESS** table to **Y**.

On executing the **C1-MEPRC** batch, the system considers the membership records whose the **OPEN_ENDED_SW** column is set to **Y** and whose the processing date is earlier than the batch business date. It then recalculates the end date of the membership and membership person and accordingly updates the processing date of the corresponding record in the **CI_MEMBERSHIP_PROCESS** table.

However, if the renewal period for open-ended membership (specified in the **C1-ASOBLLNG** feature configuration) is equal to or greater than the membership period, the system sets the end date of the membership and membership person to the enrolment end date.

Policy Cancellation through a Health Care Inbound Message

Until now, you were able to cancel a policy from the user interface. Now, a policy can be cancelled in ORMB only when the policy cancellation request is received from the source system through a health care inbound message. To implement this feature, the following changes are made in the system:

- A new option type named **Policy Cancel Status** is added in the **C1-ASOBLLNG** feature configuration.
- The **status** and **statusReason** tags are added in the **C1-HCInboundMsgExtDA** and **C1-PolicyDataCommonDA** data areas.
- A new algorithm named **C1-POLCNC** is introduced in this release.

Note: By default, this algorithm is not attached to the **Cancel** status in the lifecycle of the **C1-POLICY** business object. You need to attach this algorithm, if required.

Now, while activating, terminating, reinstating, renewing, or canceling a policy through a health care inbound message, the source system should send the following details:

Action	Required Details
Activating a Policy	<status>
Terminating a Policy	<status> <terminationInformation>
Reinstating a Policy	<status> <restateInformation>
Renewing a Policy	<status> <renewalDate>
Canceling a Policy	<status> <statusReason>

Note: While canceling a policy, the status reason is optional. You can specify a status reason which is defined for the **Cancel** status of the **C1-POLICY** business object through the **Status Reason** screen.

Once a health care inbound message is processed to cancel a policy, the system checks whether the given cancel status is specified in the **Policy Cancel Status** option type of the **C1-ASOBLLNG** feature configuration. If so, the system changes the status of the policy to **Cancel**. If the **C1-POLCNC** algorithm is attached to the **Cancel** status of the **C1-POLICY** business object, the system does the following:

- Sets the paid through date of the policy and its corresponding group memberships to NULL (i.e. blank)
- Cancels the corresponding delinquency process which is in the **Initiated**, **Delinquency In Progress**, **On Hold**, or **Pending Termination** status

Note: You need to specify the value for the **Delinquency Process Cancellation Status Reason** parameter in the **C1-POLCNC** algorithm when the **DELINPROC** feature configuration is defined in the system. Here, you must specify the status reason which is defined for the **Canceled** status of the **C1-DelinquencyProcess** business object.

Policy Plan Cancellation through a Health Care Inbound Message

Until now, there was no lifecycle for a policy plan (i.e., **C1-PolicyPlan** business object) in the system. Now, the lifecycle is defined for the **C1-PolicyPlan** business object. Two statuses are introduced in the lifecycle of the **C1-PolicyPlan** business object:

- **Active** – Used when a policy plan is created.
- **Cancel** – Used when a policy plan is canceled.

You can create a policy plan from the user interface or through a health care inbound message. While creating a policy plan from the user interface, the system, by default, sets its status to **Active**. You can cancel a policy plan only through a health care inbound message and not from the user interface. To implement this feature, the following changes are made in the system:

- Two new option types named **Plan Active Status** and **Plan Cancel Status** are added in the **C1-ASOBLLNG** feature configuration.
- The **sequence**, **status**, and **statusReason** tags are added in the **C1-HCInboundMsgExtDA** data area.
- A new algorithm named **C1-PLNCLBLC** is introduced in this release.

Note: By default, this algorithm is not attached to the **Cancel** status in the lifecycle of the **C1-PolicyPlan** business object. You need to attach this algorithm, if required.

Now, while activating or canceling a policy plan through a health care inbound message, the source system should send the following details:

Action	Required Details
Creating a Policy Plan	<sequence> <status>
Canceling a Policy Plan	<sequence> <status> <statusReason>

Points to Note:

While canceling a policy plan, the status reason is optional. You can specify a status reason which is defined for the **Cancel** status of the **C1-PolicyPlan** business object through the **Status Reason** screen.

The sequence is optional. If you do not specify the sequence, by default, the system will set the sequence to 1. It is required when you cancel a policy plan and create a new policy plan with the same plan number through the same inbound message. In such case, the sequence of the former policy plan (i.e., one which is canceled) should be set to 1 and the sequence of the latter policy plan (i.e., one which is created with the same plan number) should be set to 2.

Once a health care inbound message is processed to create a policy plan, the system checks whether the given active status is specified in the **Plan Active Status** option type of the **C1-ASOBLLNG** feature configuration. If so, the system sets the status of the policy plan to **Active**. And, once a health care inbound message is processed to cancel a policy plan, the system checks whether the given cancel status is specified in the **Plan Cancel Status** option type of the **C1-ASOBLLNG** feature configuration. If so, the system changes the status of the policy plan to **Cancel**. If the **C1-PLNCLBLC** algorithm is attached to the **Cancel** status of the **C1-PolicyPlan** business object, the system does the following:

- Cancels the policy plan level billable charges where the Policy Plan ID is stamped as the characteristic on the billable charge.

Reconciliation of Individual Medicare Benefits on Sponsor Account

Until now, the system enabled you to reconcile payable pay instructions of the sponsor account against the bill line items and thereby ensure that the discrepancy is identified and resolved on time. Now, the system enables you to reconcile Medicare benefits which may be payable or non-payable by the sponsor. In other words, you can reconcile payable and non-payable pay instructions of the sponsor account against the bill line items and thereby ensure that the discrepancy is identified and resolved on time. The non-payable pay instructions can be reconciled against memo only or non-memo charges depending on whether the membership benefit is memo only or not.

To implement this feature, the following changes are made to the system:

- The **Payable** column is available while mapping a payment type to a price item in the **C1-PayTypePrcItemMap** extendable lookup value.
- The **Payable** field is added in the **Pay Instructions** zone of the **Pay Instruction** tab in the **Reconciliation** screen.
- The **C1-RCPM** and **C1-RCNMD** batches are enhanced to support non-payable pay instructions in the reconciliation object.
- A new parameter named **Payment Type – Price Item mapping** is added in the **C1-CRDSLNITM** algorithm type.
- Two new discrepancy categories - **Record Not Found in the File** and **Record Not Found in the System** are introduced to accurately classify the non-payable pay instruction discrepancies.

Once you upload a pay instruction file which contains payable and/or non-payable instructions, the system determines whether a pay instruction is payable or non-payable using the **C1-PayTypePrcItemMap** extendable lookup value while creating a pay instruction. Once the pay instructions are created, you can filter and view the payable and non-payable pay instructions of a reconciliation object in the **Pay Instructions** zone.

While specifying the payment against which you want to reconcile the bill line items for which you have received the pay instructions, you must ensure that the payment amount is equal to only the amount of payable pay instructions. On reconciling a non-payable pay instruction, the system will check whether the membership benefit is memo only. If the non-payable membership benefit is not memo only, the system reconciles the pay instruction against the financial transaction. And, if the non-payable membership benefit is memo only, the system reconciles the pay instruction against the bill line item. However, note the system does not create a reconciliation adjustment for a non-payable pay instruction when it is successfully reconciled.

The system enables you to view the reconciliation discrepancy report at the file or account level for the payable as well as non-payable pay instructions.

Individual Membership Benefits

Oracle Revenue Management and Billing enables you to setup the following Medicare membership benefits for the fully insured individual business:

- PW (Premium with Hold)
- LEPWH (LEP with Hold)
- LEP (LEP Memo Only)
- LEPD (LEP Direct Pay)
- LIS

To support Medicare membership benefits, the following changes are made to the system:

- A new field named **Memo Only Sponsor Charge Flag** is available while defining or editing a benefit. It is used to indicate whether the memo only charge should be created for the membership benefit on the sponsor account.
- The **memoOnlySponsorCharge** tag is added in the **C1-HCInboundMsgExtDA** data area.

Future Dated Policy Termination

Until now, whenever a future dated termination request was received for a policy through a health care inbound message, the system immediately updated the status of the policy to **Terminated**. Now, while processing a health care inbound message, the system checks whether the termination date of a policy is a future date. If so, the system updates the end date of the policy but does not change the status of the policy from **Active** to **Terminated**. Instead, the system creates a record for the policy in the **CI_POLICY_PROCESS** table where the processing date is set to policy end date and the status of the policy record in the **CI_POLICY_PROCESS** table is set to **Pending**.

On executing the **C1-MEPRC** batch, the system considers those pending policy records whose processing date is earlier than the batch business date. It then changes the status of the corresponding policy to **Terminated**. In addition, the status of the policy record in the **CI_POLICY_PROCESS** table is changed to **Completed**.

To implement this feature, the following changes are made to the system:

- A new table named **CI_POLICY_PROCESS** is introduced in this release.
- The following new parameters are added in the **C1-MEPRC** batch:
 - **Policy ID** - Used when you want to process a particular policy record or membership records of a particular policy. This parameter is optional.
 - **Policy level process switch** – Used to indicate whether the batch should process the records from the **CI_POLICY_PROCESS** table or not. The valid values are:
 - **Y** - Used when you want to process the records from both the **CI_POLICY_PROCESS** and **CI_MEMBERSHIP_PROCESS** tables.

- **N** - Used when you want to process the records only from the **CI_MEMBERSHIP_PROCESS** table.

This parameter is mandatory.

- A new option type named **Policy Characteristic For Inbound Log** is added in the **C1-ASOBLLNG** feature configuration. It is used to specify the characteristic type using which the policy ID should be stamped on the inbound message when the policy status is changed to **Terminated**.

Billable Charge Upload for Fully Insured Group and Individual Business

Until now, the system enabled you to create an upload request for billable charge creation using the **C1-BillableChargeUploadRequest** business object. However, this business object was not supported to create billable charges at the policy plan, health plan, group membership, and individual membership levels.

A health insurance customer may want to adjust revenue through billable charges at the membership or plan level. Also, for a bill group, there can be multiple contracts of the same contract type for each policy plan on the bill group's accounts. Therefore, until now, the billable charges were manually created from the user interface as the above business object was not supported to create mass billable charges for the fully insured group and individual lines of business. Now, a new business object named **C1-BillableChargeUploadFI** is introduced in this release. It enables you to create billable charges at the policy plan, health plan, group membership, and individual membership levels. In addition, the system now derives the appropriate contract against which the billable charge should be created at the membership or plan level.

You need to create an upload request type for the **C1-BillableChargeUploadFI** business object. You can then upload a billable charge creation file in the CSV format using the respective upload request type. The billable charge creation file should contain records with the following additional information apart from the basic details – Source System, Policy Number, Plan Number, Health Plan Code, Subscriber Identifier Type, Subscriber Identifier, Membership Type, External Membership ID.

When the contract ID is not specified, the system uses the source system, policy number, plan number combination to derive the contract against which the billable charge should be created for the policy plan. Similarly, the system uses the health plan code to derive the contract against which the billable charge should be created for the health plan. And, when the **C1MMBRSH** characteristic is not specified in the record, the system uses either of the following to derive the group or individual membership against which the billable charge should be created:

- Subscriber Identifier Type and Subscriber Identifier
- Membership Type
- External Membership ID

Once you upload a billable charge creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. If the mandatory data is missing in any record, the corresponding data record is created in the **Invalid** status. In addition, if the system could not derive the account ID, policy plan ID, and contract ID, the corresponding data record is created in the **Invalid** status.

Once the pending records are validated, the status of the data record is changed to either **Valid** or **Invalid**. On processing a valid record, the system does the following:

- Create a billable charge for the membership or policy plan.
- Stamps the respective membership ID or policy plan ID as a characteristic on the billable charge.

If the data record is successfully processed, the status of the data record is changed to **Processed**. However, if any error occurs while creating a billable charge, the status of the data record is changed to **Error**.

Policy Plan Level Charges

Oracle Revenue Management and Billing enables you to view the billable charges created for a policy plan from the **Policy Plan** screen. A new tab named **Charges** is added in the **Policy Plan** screen. It contains two zones – **Billable Charges** and **Bill Segments**. The system lists those billable charges where the respective policy plan ID is stamped as a characteristic.

Membership Sponsor Charges

Until now, you were able to view the billable charges created for the membership on the sponsor account from the **Membership** screen. Now, you can also view the bill segments, timeline details, and pricing calculation details for each sponsor billable charge from the **Membership** screen. Three new zones named - **Sponsor Bill Segment Details**, **Sponsor Billable Charge Timeline Details**, and **Sponsor Pricing Calculation Details** are introduced in the **Charges** tab.

Invoice Request for Direct Billed Group Membership Accounts

Until now, the system enabled you to generate an adhoc regular or trial bill for an account through an invoice request for the fully insured group and individual lines of business. Now, this feature is extended to support the adhoc billing requirements of the direct billed group membership business.

The system enables you to manually or automatically create an invoice request for the direct billed group membership business. It enables you to create an invoice request for an account to which a group membership is billed directly. Before creating an invoice request for an account of a direct billed group membership, the system validates whether the direct billed group membership is eligible for the invoice request creation. You can create an invoice request only for an account of those direct billed group memberships where the **Eligible For Invoice Request Creation (INVRACTE)** characteristic is set to **Y**. Whenever an invoice request is created for the account of a direct billed group membership, the system adds the appropriate log entries for the direct billed group membership in the **Log** tab of the **Membership** screen.

Note: The system validates whether the direct billed group membership is eligible for invoice request creation using the characteristic type which is specified in the **Invoice Request-Account Eligible Char Type** option type of the **C1-INVREQ** feature configuration. By default, this option type is set to **INVRACTE**. You can change the characteristic type, if required.

The system enables you to create the following types of invoice request for the direct billed group membership business:

- **Manual Regular Bill Generation Invoice Request** – It is used to generate an adhoc regular bill for an account. You can create a manual regular bill generation invoice request for an account from the user interface.
- **Manual Trial Bill Generation Invoice Request** - It is used to generate an adhoc trial bill for an account. You can create a manual trial bill generation invoice request for an account from the user interface.
- **Automatic Regular Bill Generation Invoice Request** – It is used to generate an adhoc regular bill for an account. You can configure the system such that an automatic regular bill generation invoice request is (automatically) created for an account when a direct billed group membership is enrolled, terminated, reinstated, or canceled through a health care inbound message.

Points to Note:

The automatic invoice request creation feature is only designed to work for the fully insured group, fully insured individual, and direct billed group membership lines of business and not for the financial services or self-funded health insurance business.

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

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

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

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

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

Note: If the **Bill Generation Type** field is set to **Regular**, you must select the **Invoice Request - Regular Bill Generation** business object from the **Invoice Request Business Object** list. However, if the **Bill Generation Type** field is set to **Trial**, you must select the **Invoice Request - Trial Bill Generation** business object from the **Invoice Request Business Object** list.

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

Points to Note:

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

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

- Whether the approval is required for the invoice request

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

- The wait days using which the processing date is calculated for an invoice request

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

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

Points to Note:

The existing algorithm named **C1-INVRDTCIM** can also be used for the direct billed group membership business. It is used to calculate the cutoff date, bill date, processing date, and accounting date for an automatic regular bill generation invoice request. If required, you can configure the algorithm such that the processing date does not fall on a holiday. In that case, you need to specify the work calendar which helps to determine the working day. You can specify the work calendar in the **C1-INVRDTCIM** algorithm. Alternatively, if the work calendar is not specified in the **C1-INVRDTCIM** algorithm, the system will use the work calendar of the account's division to ensure that the processing date falls on a working day.

In addition, you can configure threshold days for the automatic invoice request creation. The system then determines whether the number of days between the bill cycle date and processing date is greater than the threshold days. If so, the automatic invoice request is created for the account. However, if the number of days between the bill cycle date and processing date is less than or equal to the threshold days, the automatic invoice request is created for the account such that cutoff date is calculated using the next window of the bill cycle.

While creating a manual invoice request, you need to specify the following – invoice request type, account, cutoff date, accounting date, and bill date. Note that before manually or automatically creating an invoice request for an account, you need to ensure that the following algorithms are attached to the respective system event of the corresponding customer class:

System Event	Algorithm
Invoice Request Account Selection	C1-INVACTEL

System Event	Algorithm
Invoice Request Status Update	C1-INVRSTUP

Manual Regular Bill Generation Invoice Request

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

On submitting or approving the invoice request, the system checks whether the number of the billable charges of the account exceeds the defer processing billable charge count. If the number of the billable charges of the account exceeds the defer processing billable charge count, the status of the invoice request is changed to **Defer Processing**. However, if the number of the billable charges of the account does not exceed the defer processing billable charge count, the system checks whether the processing date of the invoice request is earlier than or equal to the system date.

If the processing date is earlier than or equal to the system date, the system checks whether the pending bill already exists for the account. If the pending bill does not exist for the account, the system checks whether the cutoff date is later than the bill after date. If cutoff date is later than the bill after date, the system checks whether the accounting calendar is open for the accounting date. If the accounting calendar is open for the accounting date, the system creates the adhoc regular bill for the account in the online mode. Finally, the status of the invoice request is changed to **Processed**. But, if the pending bill exists for the account, or if the cutoff date is earlier than or equal to the bill after date, or if the accounting calendar is not open for the accounting date, or if an error occurs while creating an adhoc regular bill or its bill segments, the status of the invoice request is changed to **Error**. The system enables you to move such erroneous invoice request back to the **Draft** status.

However, if the processing date is later than the system date, the status of the invoice request is changed to **Defer Processing**. On the **C1-INVRQ** batch execution, the system checks whether there are any invoice requests in the **Defer Processing** status. If there is an invoice request in the **Defer Processing** status, the system checks whether the processing date of the invoice request is earlier than or equal to the system date. If the processing date is earlier than or equal to the system date, the status of the invoice request is changed to **Processing** and the algorithm attached to the **Processing** status is invoked. However, if the processing date is later than the system date, the status of the invoice request remains as **Defer Processing**.

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

Manual Trial Bill Generation Invoice Request

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

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

Automatic Regular Bill Generation Invoice Request

To enable the automatic invoice request creation feature for the direct billed group membership business, you need to attach the following algorithms:

If you want to create an automatic invoice request for the account while...	Then attach the algorithm....			
	Business Object	Status	System Event	Algorithm
Activating a direct billed group membership	C1-Membership	Active	Enter	C1-INVRQIMEN
Terminating a direct billed group membership		Terminated	Enter	C1-INVRQIMTM
Reinstating a direct billed group membership		Active	Enter	C1-INVRQIMEN
Canceled a direct billed group membership		Canceled	Enter	C1-INVRQIMCN

Points to Note:

The above three algorithms are existing algorithms and are enhanced to support the direct billed group membership business along with the fully insured individual business.

By default, the automatic invoice request creation algorithms for the fully insured group business are attached to the above-mentioned statuses in the **C1-Membership** business object. If you want to enable the automatic invoice request creation feature for the direct billed group membership business, you need to inactivate the existing automatic invoice request creation algorithms of the fully insured group business and then attach the above-mentioned algorithms to the respective status in the **C1-Membership** business object.

You can create a single or different invoice request type for each direct billed group membership event (such as, activation, termination, reinstatement, or cancelation) depending on the wait days you want to configure for the respective event.

Before automatically creating an invoice request for the account of a direct billed group membership, the system validates whether the direct billed group membership is eligible for the invoice request creation. If the direct billed group membership is eligible for the invoice request creation, the system determines the account to which the direct billed group membership should be billed using the **Account Identifier Type** and **Account Identifier Value** characteristics which are defined on the direct billed group membership. While fetching the characteristics, the system considers the characteristic types which are specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration. If the above two characteristics are not defined for a direct billed group membership, the system checks whether the billing arrangement characteristic is defined on the direct billed group membership. The system considers the characteristic type which is specified in the **Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration. If the billing arrangement characteristic is defined on the direct billed group membership, the system checks whether the characteristic value is set to **DRCT** (i.e., Direct Billing). If so, the system derives the financially responsible person's account from the system. However, if the billing arrangement characteristic is not defined on the direct billed group membership or if its characteristic value is not set to **DRCT** (i.e., Direct Billing), the system will not create the invoice request for the account.

If an account is derived for the direct billed group membership, the system checks whether any invoice request already exists for the account in the non-final status. If an invoice request exists for the account in the non-final status, a new invoice request is not created for the account. However, if an invoice request does not exist for the account in the non-final status, a new invoice request is created for the account in the **Draft** status. The system then transitions the status of the invoice request from **Draft** to **Defer Processing Batch**.

Points to Note:

The system validates whether the direct billed group membership is eligible for the invoice request creation only while activating a direct billed group membership and not while terminating, reinstating, or canceling the direct billed group membership.

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

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

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

Delinquency Management for Direct Billed Group Membership

The **Delinquency Management** feature is enhanced to support the direct billed group membership business. The system enables you to create a delinquency process at the account level for the direct billed group membership business. You can create a delinquency process at the account level only when the collection method in the respective collection class is set to **Self-Control Delinquency**. In the account level delinquency process, the system monitors the debt of the account at predefined system events and commences the delinquency process whenever the account's debt is overdue.

The delinquency process for the direct billed group membership accounts is almost similar to the delinquency process of the individual membership accounts despite having different structure (i.e., an individual membership is tied to health plan whereas a direct billed group membership is tied to a policy plan). The system enables you to initiate the termination and cancellation processes for the direct billed group memberships through the **Delinquency Management** feature. The system then creates the termination or cancellation outbound message whenever the termination or cancellation process is initiated for the group direct billed memberships, respectively, through a delinquency process.

Synchronize Membership Premium and Sponsored Benefit Bill Segment Generation Process

The membership premium and benefit charges are billed to its financially responsible person's account and the corresponding sponsored benefit charges are billed to the sponsor account. But there might be scenarios where the bill cycle of both the accounts might be different or an adhoc bill is generated for the membership. In such cases, the membership premium will be reflected in the GL accounts immediately, but the sponsor accounts may not yet have been billed. As a result, the sponsored credit charge would be reported in the GL account, but the sponsored debit charge is not yet created. This results in discrepancies when the GL accounts are reconciled by the downstream system.

To overcome these issues and synchronize the membership premium and sponsored benefit bill segment generation process, the following changes are made to the system:

- A new algorithm named **C1BSFRZCAN** is introduced in this release.
- A new field named **IS_CMS_ACCT_SW** is added in the **CI_ACCT** table.
- A new tag named **isCMSAccountSw** is added in the **C1-HCInboundMsgExtDA** data area.
- A new parameter named **CMS-ACCT-BILLING-SW** is added in both the **BILLOPEN** and **POSTPROC** batches.

Now, while creating a sponsor account through a health care inbound message, you need to specify **True** in the **isCMSAccountSw** tag. It helps the system to determine whether it is a sponsor account while billing it.

To enable the above synchronization for the required accounts, you need to attach the **C1BSFRZCAN** algorithm to the **Bill Segment Freeze/Cancel** system event of the corresponding customer class. This algorithm does the following:

- While freezing a bill segment of an account to which the membership premium is billed, the system derives the membership premium billable charge of the corresponding bill segment and checks whether there is any membership benefit charge on it. If so, the system derives the corresponding billable charge for the membership benefit on the sponsor account (with the opposite amount) where the **C1-SPONS** characteristic is set to **Y**. Once the sponsor account's billable charge is derived, the system checks whether there is any pending bill created for the sponsor account. If there is a pending bill for the sponsor account, the system creates the bill segment for the sponsored charge on the pending bill of the sponsor account and changes the status of the bill segment to **Frozen**. However, if there is no pending bill for the sponsor account, the system will maintain the error message in the system log.

- While cancelling a bill segment of an account to which the membership premium is billed, the system derives the membership premium billable charge of the corresponding bill segment and checks whether there is any membership benefit charge on it. If so, the system derives the corresponding billable charge for the membership benefit on the sponsor account (with the opposite amount) where the **C1-SPONS** characteristic is set to **Y**. Once the sponsor account's billable charge is derived, the system checks whether there is any pending bill created for the sponsor account. If there is a pending bill for the sponsor account, the system derives the bill segment of the sponsored charge on the pending bill and then changes the status of the bill segment to **Canceled**.

Now, the system provides you the ability to create and complete pending bills of the sponsor and membership accounts separately. A new parameter named **CMS-ACCT-BILLING-SW** is added in the **BILLOPEN** batch. It is used to indicate whether the system should create pending bills for the sponsor or non-sponsor accounts. If you set the parameter value to **N**, the system will skip the sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **Y**) and will create the pending bills for the non-sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **N**). If you set the parameter value to **Y**, the system will skip the non-sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **N**) and will create the pending bills for the sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **Y**). However, if you do not specify any value for the **CMS-ACCT-BILLING-SW** parameter, the system will create the pending bills for both the sponsor and non-sponsor accounts. Note that the system will not store the sponsor account details in the temporary area and will skip those sponsor accounts for which a pending bill already exists.

Similarly, a new parameter named **CMS-ACCT-BILLING-SW** is added in the **POSTPROC** batch. It is used to indicate whether the system should freeze and complete the bills of the sponsor or non-sponsor accounts. If you set the parameter value to **N** or if you do not specify any value for this parameter, the system will skip the sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **Y**) and will freeze and complete the bills of the non-sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **N**). If you set the parameter value to **Y**, the system will freeze and complete the bills of the sponsor accounts (i.e., where the **IS_CMS_ACCT_SW** field is set to **Y**). Note that the system will check whether the bill segment on the sponsor account's bill is canceled. If so, the system will stamp the bill ID of the sponsor account on the canceled bill segment's financial transaction.

Enhancements (Generic)

No enhancements are made to the features that are used in both financial services and health insurance domains.

Enhancements (Specific to Financial Services)

No enhancements are made to the features that are used in the financial services domain.

Enhancements (Specific to Insurance)

This section lists the enhancements made to the following features that are used in the health insurance domain:

- [Support Account Identifier in 820 Payment File](#)
- [C1-ASOBLLNG Feature Configuration](#)
- [Split Billing with Employer Share Percentage](#)
- [Customer 360° View](#)
- [Fully Insured Individual Age Based Pricing](#)
- [Group Membership](#)
- [Inbound Message](#)
- [Bill Group Derivation and Pricing Parameters](#)
- [Mass Payment Transfer](#)
- [C1-TransferPayment Business Service](#)
- [Hold Request](#)
- [C1-MembershipRepricing Business Service](#)

Support Account Identifier in 820 Payment File

Until now, you were able to specify the payor account ID through the **REF12** tag in the EDI 820 file format while processing the payment and remittance advices. Now, you can also specify the payor account identifier type and payor account identifier in the EDI 820 file format. A new tag named **REFZZ** is introduced in the EDI 820 file format to specify the account identifier details in the below given format:

REF*ZZ*<ACCT_IDENTIFIER_TYPE>*<ACCT_IDENTIFIER_VALUE>~

If the EDI 820 file contains the **REF12** tag, the system will directly use the payor account ID to process the payment and remittance advice. However, if the EDI 820 file contains the **REFZZ** tag, the system will first derive the payor account ID for the given account identifier type and account identifier combination and then process the payment and remittance advice.

If both **REF12** and **REFZZ** tags exist in the EDI 820 file, the system will consider the account ID given in the **REF12** tag and then process the payment and remittance advice. If the system is not able to derive the account ID or if the given account ID does not exist in the system, the system will create the payment against the suspense account (i.e., derived using the contract ID defined in the **Tender Source** screen). If multiple accounts exist in the system for the given account identifier type and account identifier combination, the system will accordingly throw an error message.

C1-ASOBLLNG Feature Configuration

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

- Round Member Premium
- Renewal period for Open-Ended Membership
- Number of months in advance for Open-Ended Renewal
- Membership Cancel Status
- Membership Person Inactive Status
- Policy Cancel Status
- Plan Active Status
- Plan Cancel Status
- Policy Characteristic For Inbound Log

Split Billing with Employer Share Percentage

Until now, the system enabled you to maintain a flat or percentage-based contribution of employer or sponsor for a retiree membership through a discount charge pricing rule. Now, the system enables you to maintain a flat or percentage-based contribution of employer or sponsor for all the following membership types through a discount charge pricing rule:

- Employee Coverage Membership
- Medicare Membership
- COBRA Membership
- Retiree Membership

Customer 360° View

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

- Now, the system will sort the accounts based on the person type (in the descending order), person name (in the ascending order) and the account setup date (in the descending order) in the **Account List** zone of the **Account** tab in the **Customer 360° Information** screen.
- Earlier, when the main customer's mailing address of an account was future dated, the system did not list the account in the **Account List** zone. Now, the system will list such accounts but the person's mailing address would be blank corresponding to the record.

Fully Insured Individual Age Based Pricing

Until now, the system referred the maximum dependent count for an individual membership from the business rule and accordingly calculated the premium for an individual membership. But, in the fully insured individual business, there are scenarios such as child only health plans where the youngest child is set the main subscriber and the bills are sent to the accounts based on the billing address.

Now, to support such business scenarios, the system will consider the minor subscriber as one of the dependent persons and will accordingly calculate the premium for the remaining dependent persons based on the maximum dependent count. For example, if there is an individual membership where:

- The main subscriber of the individual membership is a minor person.
- The number of dependents in the individual membership is 3.

Now, when the maximum dependent count in the business rule (that meets the criteria) is set to 3, then the system will calculate the premium for the minor subscriber and two dependent persons considering that the main subscriber as one of the dependent persons. The system will not calculate premium for the third dependent person in the individual membership.

Group Membership Lifecycle

The following changes are made to the **C1-Membership** business object:

- The **Inactive** status is removed, and a new status named **Canceled** is introduced in the lifecycle of the **C1-Membership** business object.
- Earlier, you were not able to activate, cancel, or terminate a group membership through a health care inbound message or through the membership repricing inbound web service. Now, the existing tags named **membershipPersonStatus** and **membershipPersonstatusReason** are enhanced to maintain the status and status reason of the main subscriber for a group membership. On changing the status of the main subscriber, the system accordingly changes the status of the group membership. The **membershipPersonStatus** tag is also used to maintain the status of the dependent persons for a group membership.
- While canceling a group membership through a health care inbound message or through the membership repricing inbound web service, you need to set the status of the main subscriber to **CNCL**. You can also specify the reason why you want to cancel the group membership. Once a health care inbound message or a membership repricing request is received to cancel the main subscriber of a group membership, the system does the following:
 - Changes the status of the main subscriber to **Canceled**.
 - Changes the status of the group membership to the status that is specified in the **Membership Cancel Status** option type of the **C1-ASOBLNG** feature configuration.

If the cancel reason is provided in the **membershipPersonstatusReason** tag, the system also checks whether the given membership person status reason already exist in the **MEMB_PERS_STAT_RSN_FLG** lookup field. If so, the system then derives the membership status reason for the respective membership person status and status reason combination from the membership status reason preference. The derived membership status reason is then stamped corresponding to the membership. If the given membership person status reason does not exist in the **MEMB_PERS_STAT_RSN_FLG** lookup field or if the membership status reason is not defined for the respective combination in the membership status reason preference, an error occurs indicating that the group membership cannot be canceled.

Once the membership status reason is updated, the system checks whether the status reason is already defined for the **Canceled** status of the **C1-Membership** business object. If the derived reason is defined for the **Canceled** status, the system then changes the status of the group membership and its main subscriber. However, if the derived reason is not defined for the **Canceled** status in the system, an error occurs indicating that the group membership cannot be canceled.

While canceling a group membership through a health care inbound message or through the membership repricing inbound web service, you must send the details only for the main subscriber and not for the dependent persons. Once the group membership is canceled, the status of the active dependent persons is changed to the status that is specified in the **Membership Person Cancel Status** option type of the **C1-ASOBLLNG** feature configuration.

Note: The end date of the dependent persons is not updated when a group membership is canceled.

- Earlier, when a policy was terminated, the status of the corresponding group memberships was changed to **Terminated** using the cascading logic. This cascading logic is now removed. Now, unless, the source system sends a health care inbound message or a membership repricing request to terminate a group membership, the status of the group membership cannot be changed to **Terminated**.

While terminating a group membership through a health care inbound message or through the membership repricing inbound web service, you need to set the status of the main subscriber to **INAC**. You can also specify the reason why you want to terminate the group membership. Once a health care inbound message or a membership repricing request is received to inactivate the main subscriber of a group membership, the system does the following:

- Changes the status of the main subscriber to **Inactive**.
- Changes the status of the group membership to the status that is specified in the **Membership Terminated Status** option type of the **C1-ASOBLLNG** feature configuration.

If the termination reason is provided in the **membershipPersonstatusReason** tag, the system also checks whether the given membership person status reason already exist in the **MEMB_PERS_STAT_RSN_FLG** lookup field. If so, the system then derives the membership status reason for the respective membership person status and status reason combination from the membership status reason preference. The derived membership status reason is then stamped corresponding to the membership. If the given membership person status reason does not exist in the **MEMB_PERS_STAT_RSN_FLG** lookup field or if the membership status reason is not defined for the respective combination in the membership status reason preference, an error occurs indicating that the group membership cannot be terminated.

Once the membership status reason is updated, the system also checks whether the status reason is already defined for the **Terminated** status of the **C1-Membership** business object. If the derived reason is defined for the **Terminated** status, the system then changes the status of the group membership and its main subscriber. However, if the derived reason is not defined for the **Terminated** status in the system, an error occurs indicating that the group membership cannot be terminated.

Once the group membership is terminated, the status of the active dependent persons is changed to the status that is specified in the **Membership Person Inactive Status** option type of the **C1-ASOBLLNG** feature configuration. Note that while inactivating a dependent person in the online or deferred (i.e., through the **C1-MEPRC** batch) mode, the system checks whether the dependent person's start date is later than main subscriber's end date.

If the dependent person's start date is equal to or earlier than main subscriber's end date, the system will automatically change the status of the dependent person. However, if the dependent person's start date is later than main subscriber's end date, the system checks whether the dependent person's information is received along with the main subscriber details in the health care inbound message or in the membership repricing request. If so, the system checks whether the status of the dependent person is set to the status that is specified in the **Membership Person Cancel Status** option type of the **C1-ASOBLLNG** feature configuration. If so, the system changes the status of the dependent person. However, if the status of the dependent person is not set to the status that is specified in the **Membership Person Cancel Status** option type of the **C1-ASOBLLNG** feature configuration, the system throws an appropriate error message while processing the health care inbound message or the membership repricing request. If the dependent person's information is not received in the health care inbound message or in the membership repricing request, the system sets the status of the dependent person (whose start date is later than the main subscriber's end date) to the status that is specified in the **Membership Person Cancel Status** option type of the **C1-ASOBLLNG** feature configuration.

In addition, while terminating a group membership, the system will check whether the end date of an active dependent person is earlier than the termination date. If so, the system will not update the end date of such dependent persons. The system will update the end date of only those active dependent persons whose end date is later than the termination date.

- Similarly, unless the source system sends a health care inbound message or a membership repricing request to reinstate a group membership, the status of the group membership cannot be changed to **Active**.

While reinstating a group membership through a health care inbound message or through the membership repricing inbound web service, you need to set the status of the main subscriber to **ACTV**. You can also specify the reason why you want to reinstate the group membership. Once a health care inbound message or a membership repricing request is received to activate the main subscriber of a group membership, the system does the following:

- Changes the status of the main subscriber to **Active**.
- Changes the status of the group membership to the status that is specified in the **Membership Active Status** option type of the **C1-ASOBLLNG** feature configuration.

If the reinstatement reason is provided in the **membershipPersonstatusReason** tag, the system also checks whether the given membership person status reason already exist in the **MEMB_PERS_STAT_RSN_FLG** lookup field. If so, the system then derives the membership status reason for the respective membership person status and status reason combination from the membership status reason preference. The derived membership status reason is then stamped corresponding to the membership. If the given membership person status reason does not exist in the **MEMB_PERS_STAT_RSN_FLG** lookup field or if the membership status reason is not defined for the respective combination in the membership status reason preference, an error occurs indicating that the group membership cannot be reinstated.

Once the membership status reason is updated, the system also checks whether the status reason is already defined for the **Active** status of the **C1-Membership** business object. If the derived reason is defined for the **Active** status, the system then changes the status of the group membership and its main subscriber. However, if the derived reason is not defined for the **Active** status in the system, an error occurs indicating that a group membership cannot be reinstated.

On reinstating a group membership, the system will not automatically change the status of the membership persons to **Active** unless the instructions to change the membership person status is received through a health care inbound message or through the membership repricing inbound web service.

- If the source system sends a health care inbound message or a membership repricing request to terminate a group membership and if the main subscriber end date is later than the inbound processing date, the system does not terminate the group membership immediately. Instead, the system creates a record for the membership in the **CI_MEMBERSHIP_PROCESS** table with the **Pending** status. The system stores the following information in the record:
 - Membership ID
 - Member Person ID
 - Whether the member person is a main subscriber
 - Processing date (it is set to future dated end date of the member person)
 - Required action (is set to **Terminate**)

The existing batch named **C1-MEPRC** is enhanced to support the future dated group membership termination. On the **C1-MEPRC** batch execution, the system checks whether there are any records in the **CI_MEMBERSHIP_PROCESS** table with the **Pending** status. If so, the system checks whether the processing date of the record is earlier than or equal to the batch business date. If so, the system determines the required action to be taken for the group membership from the record. If the **MEMB_PROCESS_FLG** column of the record is set to **Terminate** and the **MAIN_CUST_SW** column is set to **N**, the system does the following:

- Changes the status of the dependent person to the status that is specified in the **Membership Person Inactive Status** option type of the **C1-ASOBLNG** feature configuration.
- Updates the end date of the dependent person.

However, if the **MEMB_PROCESS_FLG** column of the record is set to **Terminate** and the **MAIN_CUST_SW** column is set to **Y**, the system does the following:

- Changes the status of the main subscriber to the status that is specified in the **Membership Person Inactive Status** option type of the **C1-ASOBLLNG** feature configuration.
- Changes the status of the group membership to **Terminated**.
- Changes the status of the dependent persons (if any) to the status that is specified in the **Membership Person Inactive Status** option type of the **C1-ASOBLLNG** feature configuration.
- Updates the end date of the main subscriber, dependent persons, and the group membership.

Once the required action is completed for the record in the **CI_MEMBERSHIP_PROCESS** table, the system changes the status of the record to **Complete**. However, if the system receives a reinstatement request for an group membership before processing the termination request, the system changes the status of the record in the **CI_MEMBERSHIP_PROCESS** table to **Canceled**.

Inbound Message

The following changes are made to the Inbound Message feature:

- Now, the **membershipPersonStatus** and **membershipPersonstatusReason** tags under the **memberData** parent tag are enhanced to facilitate the cancellation, termination, and reinstatement of a group membership.
- The following tags are newly introduced in the health care inbound message schema:

Parent Tag	New Tags
<policyData>	<status></status> <statusReason></statusReason>
<planData>	<sequence></sequence> <status></status> <statusReason></statusReason>
<benefitDataList>	<memoOnlySponsorCharge></memoOnlySponsorCharge>
<accountData>	<isCMSAccountSw></isCMSAccountSw>

Bill Group Derivation and Pricing Parameters

Oracle Revenue Management and Billing enables you to move the derivation and pricing parameters from one bill group to another bill group of the same parent customer who is the policy holder of the policy billed to the first bill group. This helps to support business scenarios, such as bill group movement, organizational split, mergers, etc. wherein the memberships can be billed to another bill group of the policy holder.

Now, while updating the derivation and pricing parameters of a bill group, the source system should send the full snapshot of the bill group derivation and pricing parameters through a health care inbound message. The system then checks whether each derivation and pricing parameters combination (i.e. EFFDT, SRC_SYSTEM_CD, BILL_LVL_1, BILL_LVL_2, BILL_LVL_3, BILL_LVL_4) is received for the bill group. If a particular derivation and pricing parameters combination is not received for the bill group, the system automatically changes the status of the respective derivation and pricing parameters combination to **Inactive**. If a new derivation and pricing parameters combination is received for the bill group, the system creates the record in the **Active** status.

Mass Payment Transfer

The following changes are made to the Mass Payment Transfer feature:

- Earlier, the account level mass payment transfer was not supported using the File Upload Interface feature. Now, the system is enhanced to support the account level mass payment transfer using the File Upload Interface feature.
- The mass payment transfer CSV file should contain one additional column named **Payor Account ID**. Here, you should specify the account ID of the payor. It is used when you want to perform the account level payment transfer.
- While creating a file request type for payment transfer, you need to do the following:
 - Specify the **C1-PEVT** foreign key reference corresponding to the **C1-TransferPaymentService** business service. The system will then show the payment event ID corresponding to the file record in the user interface once the payments are transferred using the **C1-FREQP** batch.
 - Specify one additional field mapping for the **Payor Account ID** column in the **Field Transformation** section.

C1-TransferPayment Business Service

The following changes are made to the **C1-TransferPaymentService** business service:

- Earlier, the account level payment transfer was not supported through the business service. Now, the business service is enhanced to support the account level payment transfer.
- A new tag named **payorAccountId** is added in the business service schema. It is used to specify the account ID of the payor. It is used when you want to perform the account level payment transfer.

Hold Request

The following changes are made to the Hold Request feature:

- Now, when you individually edit the end date of a particular hold entity or when you mass update the end date of the hold entities in a hold request from the user interface, a message appears indicating that the changes will be reflected in the deferred mode when you execute the **C1-HLMON** batch. However, if you edit any details of a hold entity other than the end date, the changes are reflected immediately in the online mode.

C1-MembershipRepricing Business Service

The following changes are made to the **C1-MembershipRepricing** business service:

- Now, the **membershipPersonStatus** and **membershipPersonstatusReason** tags under the **memberData** parent tag are enhanced to facilitate the cancellation, termination, and reinstatement of a group membership.
- The following tags are newly introduced in the **C1-MembershipRepricing** business service schema:

Parent Tag	New Tags
<benefitDataList>	<memoOnlySponsorCharge></memoOnlySponsorCharge>
<accountData>	<isCMSAccountSw></isCMSAccountSw>

User Interface (UI) Level Changes

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

Screen Name (in 6.1.0.0.0)	Changes
Deal Information	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • A new button named Mass Update is added in the Customer Hierarchy section. • The Download Pricing and Commitment option is added in the Action list. • The Download and Upload buttons are renamed to Download Pricing and Upload Pricing, respectively, in the Deal Information zone.
Pricing and Commitments	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Currency toggle button, the Compare Type list, and the Expand All and Collapse All buttons are now located in the header area of the Pricing and Commitments section. • A new option named Mass Update is added in the header area of the Pricing and Commitments section. On clicking the Mass Update option, the following changes appear in the Pricing and Commitments section: <ul style="list-style-type: none"> ○ The Currency toggle button, the Compare Type list, and the Expand All and Collapse All buttons are disabled. ○ The Select Column to Display section is hidden. ○ The Apply to All/Selected Priceitem option, the Mass Price Update and Mass Volume Update slider bars and the Apply, Apply and Simulate, and Reset buttons appear in the Pricing and Commitments section.
Price Item (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Charging Basis, Recurring Method, Bill Period and Invoice Frequency fields are newly introduced in the Main section of the Price Item zone. • The Division Price Item Description column is added in the Divisions section.

Screen Name (in 6.1.0.0.0)	Changes
Price Item (Used for Adding)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Charging Basis, Recurring Method, Bill Period and Invoice Frequency fields are newly introduced in the Main section. The Division Price Item Description column is added in the Divisions section.
Division	<p>The following change is made to this screen:</p> <ul style="list-style-type: none"> The Division Price Item Description column is added to the Price Item tab.
Benefit Sub Type (Used for Adding or Editing)	<p>The following change is made to this screen:</p> <ul style="list-style-type: none"> The Compare Premium option is added in the Main section.
Benefit Sub Type	<p>The following change is made to this screen:</p> <ul style="list-style-type: none"> The Compare Premium option is added in the Main section of the Benefit Sub Type zone.
Additional Fee Pricing Rule Type (Used for Adding and Editing)	<p>The following change is made to this screen:</p> <ul style="list-style-type: none"> The Pricing Rule Type Sub Category field is removed from the Main section.
Policy (Used of Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Status Reason field is introduced in the Main section of the Policy zone. It appears only when the cancel reason is specified while cancelling a policy. The Cancel button is removed from the Record Actions section of the Policy zone. The Status column is added in the Plans zone of the Plan tab. The Status field appears in the Plans zone of the Plan tab while filtering the policy plans.
Policy Plan (OraSearch)	<p>The following change is made to this screen:</p> <ul style="list-style-type: none"> A new column named Status is added in the Search Results section.
Policy Plan (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Status and Status Reason fields are added in the Main section of the Policy Plan zone. The Status Reason field appears only when the cancel reason is specified while cancelling a policy plan. A new tab named Charges is introduced in the Policy Plan screen.

Screen Name (in 6.1.0.0.0)	Changes
Customer 360° Information	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none">• The Status field is added in the Filters section of the Policy Plans zone in the Policy tab.• The Status column appears in the Policy Plans zone of the Policy tab.
Customer Registration	<p>The following change is made to this screen:</p> <ul style="list-style-type: none">• The Status column appears in the Plans zone of the Policy tab.
Reconciliation	<p>The following change is made to this screen:</p> <ul style="list-style-type: none">• The Payable field is added in the Pay Instructions zone of the Pay Instruction tab.
Membership (Used for Viewing)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none">• The Contracts and Charges tab is renamed to Charges.• Three new zones named Sponsor Bill Segment Details, Sponsor Billable Charge Timeline Details, and Sponsor Pricing Calculation Details are introduced in the Charges tab.

Database Level Changes

This section highlights the documents that you can refer for the following database level changes:

- [New Objects in the ORMB V7.0.0.0.0 Database](#)
- [New Objects in the OUAF V4.5.0.1.3 Database](#)
- [New Tables in the ORMB V7.0.0.0.0 Database](#)
- [New Tables in the OUAF V4.5.0.1.3 Database](#)
- [Existing Tables Modified in ORMB V7.0.0.0.0](#)
- [Existing Tables Modified in OUAF V4.5.0.1.3](#)
- [Algorithms and Algorithm Types Dropped in ORMB V7.0.0.0.0](#)
- [Algorithms and Algorithm Types Dropped in OUAF V4.5.0.1.3](#)
- [Parameters Added or Removed from Algorithm Types in ORMB V7.0.0.0.0](#)
- [Option Types Added or Removed from Feature Configurations in ORMB V7.0.0.0.0](#)
- [Characteristic Types Dropped in ORMB V7.0.0.0.0](#)
- [Batch Controls Dropped in ORMB V7.0.0.0.0](#)
- [Parameters Added or Removed from Batch Controls in ORMB V7.0.0.0.0](#)
- [Parameters Added or Removed from Batch Controls in OUAF V4.5.0.1.3](#)
- [Default User Group Application Services](#)

New Objects in the ORMB V7.0.0.0.0 Database

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 7.0.0.0.0, refer to the **Appendix A: New Objects in the Oracle Revenue Management and Billing V7.0.0.0.0 Database** in the *Oracle Revenue Management and Billing Database Administrator's Guide*.

New Objects in the OUAF V4.5.0.1.3 Database

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) which are newly introduced in Oracle Utilities Application Framework Version 4.5.0.1.3, refer to the **Appendix D: New Objects in the Oracle Utilities Application Framework V4.5.0.1.3 Database** in the *Oracle Revenue Management and Billing Database Administrator's Guide*.

New Tables in the ORMB V7.0.0.0.0 Database

To view detail information about the tables that are newly introduced in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix C: New Tables Added in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

New Tables in the OUAF V4.5.0.1.3 Database

To view detail information about the tables that are newly introduced in Oracle Utilities Application Framework Version 4.5.0.1.3, refer to the **Appendix M: New Tables Added in OUAF Version 4.5.0.1.3** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Existing Tables Modified in ORMB V7.0.0.0.0

To view the columns that are newly added, modified, or dropped from the existing tables in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix D: Existing Tables Modified in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Existing Tables Modified in OUAF V4.5.0.1.3

To view the columns that are newly added, modified, or dropped from the existing tables in Oracle Utilities Application Framework Version 4.5.0.1.3, refer to the **Appendix N: Existing Tables Modified in OUAF Version 4.5.0.1.3** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Algorithms and Algorithm Types Dropped in ORMB V7.0.0.0.0

To view the algorithms and algorithm types which are dropped in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix E: Algorithms and Algorithm Types Dropped in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Algorithms and Algorithm Types Dropped in OUAF V4.5.0.1.3

To view the algorithms and algorithm types which are dropped in Oracle Utilities Application Framework Version 4.5.0.1.3, refer to the **Appendix O: Algorithms and Algorithm Types Dropped in OUAF Version 4.5.0.1.3** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Parameters Added or Removed from Algorithm Types in ORMB V7.0.0.0.0

To view the parameters which are newly added or dropped from the existing algorithm types in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix F: Parameters Added or Removed from Algorithm Types in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Option Types Added or Removed from Feature Configurations in ORMB V7.0.0.0.0

To view the option types which are newly added or dropped from the existing feature configurations in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix G: Option Types Added or Removed from Feature Configurations in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Characteristic Types Dropped in ORMB V7.0.0.0.0

To view the characteristic types which are dropped in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix H: Characteristic Types Dropped in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Batch Controls Dropped in ORMB V7.0.0.0.0

To view the batch controls which are dropped in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix I: Batch Controls Dropped in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Parameters Added or Removed from Batch Controls in ORMB V7.0.0.0.0

To view the parameters which are newly added or dropped from the existing batch controls in Oracle Revenue Management and Billing Version 7.0.0.0.0, refer to the **Appendix J: Parameters Added or Removed from Batch Controls in ORMB Version 7.0.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Parameters Added or Removed from Batch Controls in OUAF V4.5.0.1.3

To view the parameters which are newly added or dropped from the existing batch controls in Oracle Utilities Application Framework Version 4.5.0.1.3, refer to the **Appendix P: Parameters Added or Removed from Batch Controls in OUAF Version 4.5.0.1.3** in the *Oracle Revenue Management and Billing Upgrade Guide*.

Default User Group Application Services

Oracle Revenue Management and Billing provides the following default user groups - ALL_SERVICES, C1_BSERVICES, HCAADMIN, and INADMIN. To view the application services configured for the default user groups, refer to the **Appendix B: Application Services Configured for Default User Group** 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 7.0.0.0.0 is supported:

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
Microsoft Windows 10 (64-bit) with Chromium Edge v108+, Mozilla Firefox ESR 102+, or Google Chrome Enterprise Version 108+	AIX 7.2 TL5+ (64-bit) Note: Version numbers suffixed with "+" are the MINIMUM version supported. That version and all future 4 th digit updates will be supported.	POWER 64-bit	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c
Note: Version numbers suffixed with "+" are the MINIMUM version supported. That version and all future 4 th digit updates will be supported.	Oracle Linux 8.x (64-bit)	x86_64	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c
	Note: Here, x represents the vendor supported version.			
	Red Hat Enterprise Linux 8.x (64-bit) Points to Note: Here, x represents the vendor supported version. Oracle Revenue Management and Billing is tested and certified on Oracle Linux 8.x. Oracle Linux is 100% user space-compatible with Red Hat Enterprise Linux, and therefore Oracle Revenue Management and Billing is supported on Red Hat Enterprise Linux.	x86_64	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
	Microsoft Windows Server 2016+ (64-bit)	x86_64	Oracle WebLogic 12.2.1.4 (64-bit)	Oracle Database Server 19c

Points to Note:

Oracle Applications are developed and tested on Oracle Linux, which is optimized for performance, stability, and security.

Microsoft Windows Server is not supported for the Production environments. We strongly recommend you 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

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

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

Supported Upgrades

At present, we support the step-by-step upgrade from Oracle Revenue Management and Billing Version 6.1.0.0.0 to 7.0.0.0.0. For more information on how to perform step-by-step upgrade, refer to the following documents which are available on OTN or OHC:

- *Oracle Revenue Management and Billing Version 7.0.0.0.0 Upgrade Path Guide*
- *Oracle Revenue Management and Billing Version 7.0.0.0.0 Upgrade Guide*

If you want to directly upgrade the Oracle Revenue Management and Billing database from 2.5.0.1.0 or any later version to 7.0.0.0.0, refer to the *Oracle Revenue Management and Billing Direct Database Upgrade from 2.5.0.1.0 to 7.0.0.0.0*. We recommend you follow the direct upgrade process while upgrading the ORMB database from 2.5.0.1.0 or any later version to 7.0.0.0.0 because it involves a smaller number of steps and saves time.

Unsupported Integrations

We are not supporting Oracle Documaker integration with Oracle Revenue Management and Billing Version 7.0.0.0.0. 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 or OHC:

- *Oracle Revenue Management and Billing Banking User Guide*
- *Oracle Revenue Management and Billing Bill and Letter Reports Configuration Guide*

Oracle Utilities Application Framework Version 4.5.0.1.3 Enhancements

The following enhancements are made in Oracle Utilities Application Framework (OUAF) Version 4.5.0.1.3:

- [Product Usability Enhancements](#)
- [To Do Management and Processing Enhancements](#)
- [Batch Processing Enhancements](#)
- [Implementation Tool Enhancements](#)
- [Integration Enhancements](#)
- [Content Migration Assistant \(CMA\) Enhancements](#)

Note: The **Steps to Enable**, **Tips and Considerations**, **Key Resources**, and **Role Information** sections provide guidelines for enabling each feature, wherever applicable.

Product Usability Enhancements

This section describes the following new and enhanced product usability features introduced in this release:

- [Ability to Override Labels in Business Object Configuration](#)
- [Terminology Change: Sidebar Replacing Dashboard](#)

Ability to Override Labels in Business Object Configuration

The following language related to a business object status may now be overridden by your implementation:

- **Status Description:** This is the text visible when displaying the current status of a record that is governed by a business object.
- **Next Status Action Label for the Business Object Status Next Status:** This is the text visible on an action button that you may use to transition a record to the next status.

For example, you could change the status "Canceled" for a given business object to use the term "Discarded". You could do this by navigating to the lifecycle definition for that business object and providing an override description for the "Canceled" state. In addition, you can find the states that transition to Canceled and override the Action Label from "Cancel" to "Discard".

The description of any product-delivered business object Status Reason can now also be overridden by your implementation.

Note: There are places where a status or a status reason description is captured as an audit of a point in time, such as in a log record. If you change the description of a status on a business object or the description of a status reason, the change will not cascade to any place that has captured the description previously.

This does not impact any existing extensions. The user interface may change if you choose to override descriptions.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

The product delivers two new views:

- **F1_BUS_OBJ_STATUS_VW:** This view is built from the data in **F1_BUS_OBJ_STATUS_L**, but it sets the value of the **DESCR** field to the new override description if populated (otherwise to the description).
- **F1_BUS_OBJ_STATUS_RSN_VW:** This view is built from the data in **F1_BUS_OBJ_STATUS_RSN_L**, but it sets the value of the **DESCR** field to the new override description if populated (otherwise to the description).

If you have any custom zones that retrieve the **DESCR** field from **F1_BUS_OBJ_STATUS_L** or from **F1_BUS_OBJ_STATUS_RSN_L** and you plan to override any business object status description or a status reason description, you should update your custom zone to use the corresponding view instead.

Terminology Change: Sidebar Replacing Dashboard

The vertical area that stays anchored in the application as a user moves through the system is now referred to as a "Sidebar" instead of a "Dashboard." This change is reflected in documentation, metadata descriptions, and configuration on the User page related to the area (including the Sidebar Width, the Sidebar Location and the Sidebar State). This does not impact any extensions.

This allows the "Sidebar" to be distinguished from other "Dashboards" used to describe portals that display high-level views of a specific subject area. For example, **Batch Day Dashboard** and **To Do Dashboard**.

Steps To Enable

No steps are required to enable this feature.

To Do Management and Processing Enhancements

This section describes the following new and enhanced To Do features introduced in this release:

- [Duration Information Added to the To Do Portal and Information String](#)
- [Related To Do Support Improvements](#)

Duration Information Added to the To Do Portal and Information String

The system now includes the following calculated duration information on the **To Do Entry** page:

- For a non-complete To Do, the Total Duration from its creation until now.
- For a completed To Do Entry, the Total Duration from its creation until its completion.
- For a To Do Entry that had ever been in the In Progress state, the Time In Progress. If it is currently in the In Progress state, the end duration time is the current date/time.

In addition, the base delivered Information string for a To Do Entry has been updated to include the age for a non-complete To Do and the duration for a completed To Do.

If your implementation uses a To Do information algorithm to override the base delivered information, you will not see any change to your To Do information. This change does not impact any extensions.

When you see the calculated duration information, it helps you understand at a glance how long a To Do entry took to work on and how long before it was completed.

Steps To Enable

No steps are required to enable this feature.

Related To Do Support Improvements

The zone that displays related To Do entries on the **To Do Entry** maintenance portal has been enhanced to support actions on the related To Do entries. In addition, the current To Do being maintained is included in the results so that you can perform actions on all To Do entries.

The **Related To Do Entries** zone supports all the actions available on the **To Do Management** portal. You can do mass assignment, mass updates to priority, mass addition of a log entry, and mass completion. In addition, you have access to the **Work** button to push all the related To Do entries into your Worklist. The actions are only available if a user is allowed to work all the related To Do entries.

On the **To Do Management** zone and the **To Do Details** zone on the **To Do Dashboard** portal, the link for the Related To Dos message now brings you to the **To Do Entry** maintenance portal. Previously, you were brought to the **To Do Search** page where you could do actions only on the To Do entries related to the one in the results.

This does not impact any extensions.

The ability to action one or more related To Dos on the **To Do Entry** maintenance portal provides improved support for managing multiple records.

Steps To Enable

No steps are required to enable this feature.

Batch Processing Enhancements

This section describes the following new and enhanced batch processing feature introduced in this release:

- [Batch Job Submission Portal](#)

Batch Job Submission Portal

The **Batch Job Submission** page has been converted to a portal, leveraging a more flexible user interface metaphor. The portal organizes information in a way that makes it easier to review and enter key details, such as batch job parameters.

In addition, the following user interactions were changed in the portal:

- The **Add** dialog now requires the batch control to be entered via a popup map.
- The **Duplicate and Queue** action is renamed to **Duplicate**.
- A new action of **Rerun** has been introduced. This action has the same behavior as **Duplicate** with the exception that it populates the batch rerun number with the batch number in context. This replaces the current dialog whereby a user must manually enter the batch number to be rerun in the batch rerun number field.
- The action buttons now only appear if the user has "execute" access for the batch control in context and has security access to the "queue" action for the batch job submission application service.
- New searches have been introduced for both the batch control entry, on the add popup, and the batch user on the add, duplicate, and rerun input pages. For batch controls, the results are restricted to batch controls to which the user has access. For users, results are restricted to users who have access to the batch control in context.
- The batch number is now displayed as a link to the batch run tree. This replaces the context menu.
- Several fields have been rearranged to increase the amount of space available for the batch parameters. This includes:
 - Moving the submission method to the **Record Information** section.
 - Moving the override and debugging parameters to a collapsed **Additional Run Details** section under **Record Information**. Note that this applies to input windows as well.
 - Suppressing the submission user field if the batch user and submission user are the same.
 - Removing the detailed description column from the batch parameters grid and replacing it with a widget that can be clicked to show the detailed description if needed.

This does not impact any extensions.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

A new business object (BO) for Batch Job Submission and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and merge it into the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

Object	New Application Service	Access Added to any User Groups with this Application Service / ReadAccess
Batch Job Submission Portal	F1BCHJOB	CILZRBPP

Note that any existing bookmarks for this page will take you to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Batch Job.
2. Navigate to the **Batch Job Submission** portal page via the menu.
3. Search for and select the Batch Job you noted from your bookmark. This takes you to the new page.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Implementation Tool Enhancements

This section describes the following new and enhanced implementation features introduced in this release:

- [Additional Terms Added to SQL Allowlist](#)
- [Business Object Portal Improvements](#)
- [Extended Tree Node Broadcasting Capabilities](#)
- [Extensions Dashboard Improvements](#)
- [Maintenance of Lookup Values Improvements](#)

Additional Terms Added to SQL Allowlist

The following terms were added to the SQL Allowlist:

- CHR
- COALESCE

- LAG
- NEXT_DAY
- REGEXP_INSTR
- REGEXP_REPLACE
- REGEXP_SUBSTR
- RPAD
- RTRIM
- XMLQUERY

Note that the terms were also added to the allowlist in previous releases via patches. This does not impact any extensions.

Additional terms included in SQL allowlist provides implementations with more capabilities when writing SQL statements in data explorers.

Steps To Enable

No steps are required to enable this feature.

Business Object Portal Improvements

Business object option types and algorithms system events are now documented in designated extendable lookups, **Option Configuration** for option types and **Algorithm Entity Type** for system events. It is noted whether they support single or multiple values. This configuration is for documentation purposes only. Previously, there was no indication as to whether a business object's option type or algorithm system event implemented a single value or supported multiple values.

Using this information, the **Business Object** portal uses an icon to highlight whether a single value option type or algorithm system event record has been overridden by a higher sequence record. The situation may occur when the business object's option or system event configuration is extended by other products or customers. In the same way, an icon is used to highlight that a business object algorithm has been inactivated. The use of these icons makes it easier to focus on configuration records that are in effect and active.

The detailed description of the option types are presented in a more user friendly and searchable way. Also, as of this release, you can maintain reasons for a specific status directly on the **Lifecycle** tab where you review and maintain all other status-related configurations.

This does not impact any extensions.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If you have introduced custom business object-related option types, it is recommended that you also define them in the Option Configuration extendable lookup to indicate whether the option type assumes a single value or multiple values. By default, the **Business Object** portal displays an option type that is not defined in the extendable as if it supports a single value.

In the same way, if you have introduced custom business object related system events, it is recommended that you also define them in the Algorithm Entity Type extendable lookup to indicate whether the system event assumes a single algorithm or multiple algorithms. By default, the **Business Object** portal displays a system event that is not defined in the extendable as if it supports multiple algorithms.

Extended Tree Node Broadcasting Capabilities

The Populate Node and Override Information tree node algorithms can now optionally set the broadcast fields to use. When this information is not provided, the default primary key field names are used. Previously, when a user clicked on the broadcast icon on a tree node, the broadcasted field names were hardcoded to the node entity's primary key field names. While this was appropriate for most entities, there were use cases where the broadcasted field names should have differed from key names.

In addition, these tree node algorithms can now also determine that for a specific node the broadcast icon is not applicable and therefore should not be displayed. The tree node definition must explicitly allow broadcasting for the icon to appear and the algorithm can only set it to not appear as needed for a specific node.

This does not impact any extensions.

This allows for better support of complex tree node broadcasting requirements and provides more flexible interaction with trees.

Steps To Enable

No steps are required to enable this feature.

Extensions Dashboard Improvements

The **Extensions Dashboard** portal was enhanced to show all revisions made to an extension entity in descending order in a new **Revision Control** zone. The **Configuration Migration** zone was also added to also list all Content Migration Assistant migration objects that applied changes to an extension entity. These zones appear only when an extension entity is selected.

A new **Review** tab was added to the **Extensions Dashboard** portal to highlight rare duplicate configuration issues that may arise after an upgrade. Utilities can use this information to adjust their configuration.

This does not impact any extensions.

The new user experience allows utilities and partners to improve the way they track and manage their extensions, which helps to reduce implementation costs.

Steps To Enable

No steps are required to enable this feature.

Maintenance of Lookup Values Improvements

Lookup values can be easily filtered by various criteria and a smaller set of records can be selected for update. This helps handle lookup fields, like algorithm entity, that have too many values to manage as a single list. This does not impact any extensions.

This improved user experience helps to reduce implementation costs.

Steps To Enable

No steps are required to enable this feature.

Integration Enhancements

This section describes the following new and enhanced integration feature introduced in this release:

- [Object Storage Region Configuration Improvements](#)

Object Storage Region Configuration Improvements

The definition of valid cloud object storage regions are now configured using an extendable lookup rather than a lookup. Defining the regions in an extendable lookup allows us to support defining both the region key and the region identifier. Previously, using a lookup to define the region supported only defining the region key. Product code was required to map the region identifier, requiring code change any time a new region was defined.

The product provides base delivered values for all the regions that are provisioned for cloud services. You can define a region for cloud object storage that is not provided by the base product using the region value in the extendable lookup.

For backward compatibility for upgrading implementations, all regions previously provided in the lookup that are not in the list of those that the product is supplying are provided in the extendable lookup with a "CM" (customer modification) owner.

This does not impact any extensions.

As Oracle Cloud expands the regions it offers, this change allows the services to react to these new regions quickly without changes to the product code.

Steps To Enable

No steps are required to enable this feature.

Content Migration Assistant (CMA) Enhancements

This section describes the following new and enhanced CMA feature introduced in this release:

- [User Import with Content Migration Assistant](#)

User Import with Content Migration Assistant

The user record includes a user hash for security reasons. This hash value is calculated using a cryptography key in a given environment. When using Content Migration Assistant to import users from another environment, the process now includes a step to recalculate the user hash value using the target environment's cryptography key.

This update means implementations can import users from one environment to another without getting an error related to the user hash.

Steps To Enable

No steps are required to enable this feature.

Deprecation Notices for OUAF Version 4.5.0.1.3

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

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

Deprecation in This Release

No functionality or system data is deprecated in Oracle Utilities Application Framework Version 4.5.0.1.3.

Deprecation Planned for Future Releases

This section lists the functionalities and system data that will be deprecated in the future releases of Oracle Utilities Application Framework:

- [Support for Previous User Experience](#)
- [Workflow and Notification Metadata and Database Tables](#)
- [Mobile Application Framework Metadata](#)
- [Key Ring Validation Scripts, Algorithm Types, and Algorithms](#)
- [UI Metadata Related to Converted Pages](#)
- [Miscellaneous System Data](#)
- [XSLT Managed Content Type](#)
- [REST IWS - Original REST Servlet](#)
- [Append Setting from Pagination](#)
- [Support for Master/Subordinate Servers for Web Service Catalog](#)
- [Batch Run Statistics Portal Functionality](#)
- [F1-MAINPROC Business Object Read When Pre-processing Exists](#)

Support for Previous User Experience

In the current release, the product provides an option to Switch UI View. This changes the current user experience for the user for that session. Assuming the user is in the latest user experience (referred to as Redwood), this action switches the user experience to the previous look-and-feel.

In the future, the product plans to remove support for the ability to switch that design that preceded Redwood.

Workflow and Notification Metadata and Database Tables

Workflow and notification functionality was an early way to support exchanging messages with an external system (notification) and providing a configurable process for acting on incoming messages (workflow). In more recent years, the functionality for managing external messages is supported using Outbound Message and Inbound Web Service functionality. In addition, there are several features to support processing incoming messages. Service scripts can handle simple use cases. For more complicated processes, the service task or other business object driven objects are available.

The metadata and database tables related to this feature will be removed in a future release. Note that only a portion of the functionality for this feature is managed by Oracle Utilities Application Framework.

Mobile Application Framework Metadata

Removal of support for the Mobile Application Framework has already been announced in a previous release. However, there is metadata still included in the application related to this functionality.

The metadata will be removed in a future release.

Key Ring Validation Scripts, Algorithm Types, and Algorithms

The product is removing all scripts, algorithm types, and algorithms that performed validation rules on the K1-SignatureKeyRing business object. The algorithms have been removed from the BO configuration. There are requirements to expand the use of a signature key ring beyond the current implementation for object file storage and the existing validations are not applicable to other planned use cases.

The following items will be removed in a future release:

Object Type	Object Name
Algorithm	K1-KRDCKFS, K1-KRINCKFS
Algorithm Type	KRDCKFS, K1-KRINCKFS
Message	11009/1402
Plugin Script	K1-KRDCKFS, K1-KRINCKFS
Service Script	K1-ChkCfgExL

UI Metadata Related to Converted Pages

The UI metadata related to fixed pages that have been converted to portals will be removed in a future release. The navigation keys listed are related to each maintenance page. The related UI program component data will also be removed. Note that the metadata related to the search pages will not be removed at this time in case they are used on other fixed pages.

User Interface	Metadata
To Do Entry Maintenance	<ul style="list-style-type: none"> • toDoEntryCharGrid • toDoEntryDrillKeyValuesListGrd • toDoEntrySortKeyValuesListGrid • todoentrykeyvalue • todoentrymain • toDoEntryMaint • toDoEntryPopupAdd • toDoEntryPopupForward • toDoEntryPopupSendBack • Any help navigation keys
Table Maintenance	<ul style="list-style-type: none"> • metaDataTableFieldsGrid • metaDataTableMainPage • metaDataTableCFldsGrid • metaDataTableConstPage • metaDataTableMaint • metaDataTableRefByConstPage • metaDataTableFieldPage • Any help navigation keys
Work Calendar Maintenance	<ul style="list-style-type: none"> • workCalendarMaint • workCalendarMainPage • workCalendarHolidayGrid • Any help navigation keys
Message Maintenance	<ul style="list-style-type: none"> • msgMaintDetailsPage • msgMaintGrid • msgMaintPage • msgMaintTabMenu • Any help navigation keys
Time Zone Maintenance	<ul style="list-style-type: none"> • timeZoneMainPage • timeZoneTabMenu • Any help navigation keys
Application Security Portal	<ul style="list-style-type: none"> • f1appsecTabMenu
Display Icon Portal	<ul style="list-style-type: none"> • displayIconRefMaint

Miscellaneous System Data

The following metadata is no longer in use and will be removed in a future release:

Object	Data	Description/Comments
Lookup Value	CHAR_ENTITY_FLG	Characteristic Entity
	F1SE	Sync Request Inbound Exception
Script	F1-TDMgActSS	To Do Management – Process Actions (Deprecated) Note: Replaced by F1TDMgActSS.
	F1AddDebugLg	Add Log for Monitoring Probe (Deprecated) Note: Replaced by a BS named F1-MONPRBLOG.
	F1MgOImpMnt	Not in use by base functionality
	F1MgoSqlPkS	Not in use by base functionality
	F1MgOImpPst	Not in use by base functionality
UI Map	F1-MigrObjectImportMaintenance	Not in use by base functionality
Zone	F1-BOMOSRCH	Not in use by base functionality
	F1-CATCHSCH	Not in use by base functionality
	F1-MONAVKEY	Not in use by base functionality
	F1-REVCONQRY	Not in use by base functionality

XSLT Managed Content Type

Entries in the Managed Content table related to XSL should be using the XSLTC managed content type and not the XSLT managed content type. In a future release, the XSLT managed content type will no longer be supported.

REST IWS - Original REST Servlet

The original URL supplied for invoking IWS based REST services included the IWS Service name in its makeup. Support for this will continue for backward compatibility purposes, but it will be deprecated in a future release. You should adjust your existing integrations to use the currently supported URL.

Append Setting from Pagination

There are several known issues with the functionality of the "append" option in pagination. It is recommended that you do not use this pagination setting.

Support for Master/Subordinate Servers for Web Service Catalog

The Service Catalog Configuration (master configuration) enables you to define subordinate servers. Defining subordinate servers is no longer applicable for the OracleIntegration Cloud.

Batch Run Statistics Portal Functionality

The **Batch Run Statistics** portal provides additional information about batch runs, but some functionality on the portal is related to capturing additional information from an external tool. This information is stored in a Fact record. Support for capturing additional information from an external tool will be discontinued in a future release.

F1-MAINPROC Business Object Read When Pre-processing Exists

In the original implementation of configuration tools, the main framework maintenance BPA (F1-MainProc) did not perform a Read of the BO when a pre-processing script was linked to the BO via options. The pre-processing script was responsible for the Read.

In a subsequent release, a BO Read was added in F1-MainProc (even if a pre-processing script existed) to resolve a UI Hint issue related to child business objects. This solution introduced a problem only visible for specific scenarios and a different fix has been introduced. The new fix made the BO Read unnecessary in F1-MainProc. Because there are many pre-processing scripts that are properly performing the Read of the BO, ideally the BO Read should be removed from F1-MainProc so that multiple reads are not performed. However, there may have been pre-processing scripts introduced after the BO Read was included in F1-MainProc that were coded to not perform a BO read in the pre-processing script. Due to this situation, the BO Read is still performed as part of the processing of F1-MainProc.

When a pre-processing script exists, we plan to remove the BO Read from F1-MainProc logic. You should review your custom pre-processing scripts that are linked to your BO options to ensure that they properly perform a Read of your BO.

Deprecation Notices for ORMB Version 7.0.0.0.0

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](#)
- [Deprecated Platforms](#)
- [Deprecation Planned for Future Releases](#)

Deprecation in This Release

The following table lists the objects which are deprecated in this release of Oracle Revenue Management and Billing:

Object Type	Object Name
Screen	Rate Check, Policy (P&C), Insurance Control Central, Collection Control Central, Account Current, Variance Parameter

Deprecated Platforms

From Oracle Revenue Management and Billing Version 7.0.0.0.0 onwards, ORMB will not be certified on IBM WebSphere application server.

Deprecation Planned for Future Releases

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

Object Type	Object Name
Algorithm Type	C1_CURALG, SA_DERV_POPC, C1-AUDEVMPR, C1-PLASGNAU, C1-PRCASGNAU, C1-PLAUALG
Algorithm	C1-AUDEVMPR, C1-PLASGNAU, C1-PRCASGNAU, C1-PLAUALG
Feature Configuration	C1_EX_ROUND
Option Types	Currency Conversion Algorithm and Payment Distribution To-Do (from the C1_MLTCURACC feature configuration)

Object Type	Object Name				
Table Columns	<p>The following table lists the columns which will be deprecated in the next release:</p> <table> <tr> <th>Table Name</th><th>Column Name</th></tr> <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> </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, BILLING				
View	CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW				
Business Service	<p>C1-EffectivePricing, C1_PriceParmBS</p> <p>Note: Instead of using the C1-EffectivePricing business service, use the C1-GetEffectivePricing business service to view the data on the Pricing (Account) and Pricing (Person) screens. Similarly, instead of using the C1_PriceParmBS business service, use the C1_PRICE_PARM business object to add, edit, copy, and delete a parameter.</p>				
Service Program	EFFPRCSERVICE, C1_PRICEPARM				
Column	ADDRESS1, ADDRESS2, ADDRESS3, ADDRESS4, CITY, NUM1, NUM2, COUNTY, POSTAL, HOUSE_TYPE, GEO_CODE, IN_CITY_LIMIT, STATE, and COUNTRY from the CI_PER table				
Table	CI_PER_ADDR_SEAS				

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

Product Documentation

User manuals and other technical documents are available in the Portable Document Format (PDF) format. You can download the release-specific documentation from either of the following locations:

- **Oracle Technology Network (OTN)** – You can access the ORMB release-specific documentation libraries from OTN using the following URL:

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

It contains the **Documentation Library for Oracle Revenue Management and Billing On-Premises Solution** section. You can view and download a release-specific documentation library by clicking the **View Library** and **Download** links, respectively, corresponding to the respective ORMB version.

- **Oracle Help Center (OHC)** – You can access the ORMB release-specific documentation from OHC using the following URL:

<https://docs.oracle.com/en/industries/financial-services/revenue-management-billing/index.html>

The ORMB OHC page contains a drop-down list which allows you to select the ORMB version for which you want to access the documentation.

Points to Note:

You can access the documentation of a release prior to 5.0.0.0.0 from OHC by selecting the **Previous Releases** option from the list.

Always ensure that you download latest revision of the document from **OTN** or **OHC**.

From 6.0.0.0.0 release onwards, the Oracle Revenue Management and Billing Online Help (i.e., help.ear file) is not packaged with the application. The ORMB Online Help is published on Oracle Help Center (OHC). You can continue to use context-sensitive help from the application which will point to the respective topic on OHC.

Documentation Updates

Here are some updates with respect to the ORMB documentation:

- From 6.0.0.0.0 release onwards, the Oracle Revenue Management and Billing Online Help (i.e., help.ear file) is not packaged with the application. The ORMB Online Help is published on Oracle Help Center (OHC). You can continue to use context-sensitive help from the application which will point to the respective topic on OHC.
- You can also directly access the online help on OHC in the standalone mode using the following URL:
https://docs.oracle.com/en/industries/financial-services/revenue-management-billing/61000/ormb-online-help/Topics/ORMB_Intro.html
- The Reporting User Guide is decommissioned and no longer supported. For information related to the reporting feature, you need to refer the **Reporting** chapter in the Banking User Manual or Insurance User Manual.
- Oracle Utilities Application Framework Version 4.5.0.1.3 Software Development Kit Guide is available along with the release-specific documentation on the ORMB OHC page.


Media Pack Download

Oracle Financial Services Revenue Management and Billing 7.0.0.0.0 and Oracle Insurance Revenue Management and Billing 7.0.0.0.0 media packs can be installed on the following supported platforms:

- AIX (64-bit)
- Microsoft Windows (64-bit)
- Linux (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 7.0.0.0.0 Quick Installation Guide*.

To download the media packs:

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 7.0.0.0.0** or **Oracle Insurance Revenue Management and Billing 7.0.0.0.0** media pack.
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. Ensure that all the packages in the media pack are selected and then click **Download**. An executable file is downloaded on your local machine.
13. Run the executable file. The **Oracle Download Manager** window appears.
14. Browse to the location where you want to download the packages and then click **Next**. The packages are 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
36834741	36765163	C1-HLMON RUNNING LONG
36828219	36799022	PAYMENT/TENDER UI_HYPERLINKS ARE NOT WORKING
36822942	36822927	CM-PUPGP IS NOT PROCESSING PAYMENT RECORDS FROM BANK-7.0
36820362	36820559	AFTER UPDATING VOLUME IF WE UPLOAD ANY THING ELSE THE OLD VOLUME IS SHOWN UNTIL THE SCREEN IS REFRESHED
36751667	36236696	DEAL: NOT ABLE TO COMPARE TWO DEAL VERSIONS
36731304	36723740	SYSTEM ALLOWS TO ADD MULTIPLE RECURRING PRICING RULE FOR THE SAME PRODUCT FOR THE SAME DURATION. - 7.0
36719917	36684212	EVENT ACTIVATION ALGO SEQUENCE IS NOT WORKING AS EXPECTE
36719887	36715375	HOLD REQUEST POSTPONE DATE IS NOT GETTING UPDATED IN CASE OF OVERDUE PROCESS.
36705765	-	INCORRECT AGE CALCULATION ON OPEN ENDED MEMBERSHIP RENEWAL
36705756	-	NEWBORN GIFT PERIOD NOT APPLIED CORRECTLY FOR PLAN WITH MULTIPLE RATES
36694681	36606256	HOLD REQUEST POSTPONE DATE IS NOT GETTING UPDATED
36672569	36482855	UNHANDLED ERROR WHEN POLICY ROLE IS NOT SUPPLIED FOR A POLICY PERSON - FORWARDPORT
36653231	35590609	THE AMERICANS WITH DISABILITIES ACT(ADA) COMPLIANCE. NON-TEXT CONTENT
36640237	36529812	AUTOPAY CREATION DATE CONSIDERING WORKING DAYS INSTEAD OF CALENDAR DAYS
36630733	36600460	IBC GROUP - BILL GROUP ACCOUNT CONTRACT CREATION FOR TPAC AFFILIATE SCENARIO - FORWARDPORT
36585743	36484295	ACCOUNTS RECEIVABLE CENTRAL ZONE SQL ERROR - FORWARDPORT
36552554	36389599	DUPLICATE SEQUENCE NUMBER IN TRANSACTION PRICEITEM TABLE FOR SKIPPED TRANSACTION LEGS - FORWARDPORT

Bug Number	Copy of (Base Bug)	Description
36533816	36482019	ERROR IN SAVING MPP PRICING RULE AFTER DELETING THE PREVIOUS ONE
36533788	36406595	PERFORMANCE ISSUE IN BATCH C1-ACSSL AFTER INSTALLED PATCH 36256163 - FORWARDPORT
36533777	36406615	ERROR IN SAVING MPP PRICING RULE AFTER DELETING THE PREVIOUS ONE - FORWARDPORT
36492805	36308476	GLS JOB RUNNING LONG
36491751	36241279	HOLD REQUEST RELEASE FOR DELINQUENCY
36484787	36481096	CUSTOMER IS UNABLE TO SET THE BO NAME FOR THE ACCOUNT BO AS PER CUSTOMER REGISTRATION OF THE INBOUND MESSAGE
36480034	36278089	LEVEL FUNDED - ERROR IN LF ACCUMULATION BILLABLE CHARGE POST PROCESSING SPOT - FORWARDPORT
36479954	35293715	LTRPRT JOB FAILED WITH ORA-00001 UNIQUE CONSTRAINT
36479866	36168892	TRANSACTION VOLUME NOT SHOWING CORRECTLY ON TRANSACTION DETAILS ZONE ON BILL DRILL DOWN
36479840	35678158	ERROR WHILE UPLOADING A PAYMENT WHEN WE HAVE MULTIPLE CHECKS ON A GIVEN DAY
36479671	36256163	INCORRECT SSL CREDIT CALCULATION WHEN MEMBER MOVES ACROSS BILLING GROUP - 7.0
36479664	36264855	PERFORMANCE ISSUE IN BATCH C1-ACSSL -7.0
36454968	36303154	EDITING ANCILLARY PRICING RULE WITH CHARACTERISTIC IS CAUSING SERVER ISSUE
36454739	36332700	CASE INFO IN CASE MAIN TAB IS NOT SHOWING IN A SINGLE LINE
36434064	36412156	CM-EXSPM QUERY FOR SA TYPE CODE PICKING HUGE DATA - FORWARDPORT
36428536	36299523	TRANSFER AMOUNT VALUE IS DISPLAYED INCORRECTLY IN PAYMENT TRANSFER SCREEN
36406604	36304862	PERFORMANCE ISSUE IN BATCH C1-ACSSL AFTER INSTALLED PATCH 36256163 - FORWARDPORT
36274639	36059319	TFM - ACCOUNT DERIVATION ISSUE
36209121	35818508	UPGRADE 5.1 - CHARACTERISTICS NOT SHOWING ON CONTRACT UI

Bug Number	Copy of (Base Bug)	Description
36149684	35953662	APPROVE BUTTON IS NOT ENABLED IN FUNDING REQUEST UI
35377226	-	APPROVAL TRANSACTION SEARCH UI OBSERVATIONS
33361634	33355261	FWDPRT: URGENT: DEAL PRICING AND COMMITMENT SCREEN ISSUE
36823164	36675252	GLS BATCH PERFORMANCE ISSUE
36811748	36274639	C1-TXNIP - ALL TRANSACTIONS MARKED AS ERROR IF THERE ARE 2 ACCOUNTS WITH SAME ACCT_NBR
36783693	35373706	THE PARAMETERS FOR RULES APPEAR BLANK WHEN WE TRY TO VIEW IT FROM VIEW BUTTON.
36771950	36528767	IN THE FEED MANAGEMENT SCREEN, WHEN CLICKING THE RULE HYPERLINK, THE RULE O/P PARAMS ARE NOT SHOWN
36769048	36723407	3 STEP PAYMENT BATCHES ARE NOT PICKING THE PAYMENTS FOR A BILL WITH > 900 BILL SEGMENTS -FWP70
36764759	36710582	SEARCH FIELD IN APPLICATION TOOLBAR AND ADDRESS RELATED FIELDS SIZE LOOKS BIGGER
36756772	36690282	DEAL MANAGEMENT : REQUEST FROM CLIENT TO CHANGE DEAL ACTION LABEL
36751645	36264363	DEAL MANAGEMENT: VOLUME AGGREGATION BATCHES NOT CALCULATING CORRECT VOLUME
36749701	36697026	NBBRULEGENERATEPAYMENTSCHEDULECOMPONENT INVALID ALGORITHM SPOT FOR CUSTOM ALGORITHM IMPLEMENTATION
36744356	36268158	CHANGES DONE IN HIERARCHY ARE NOT GETTING REFLECTED CORRECTLY IN CONSTRUCT
36743814	36499708	WHEN APPROVING BILL FACTOR WITH VALUES GREATER THAN 30 , AN ERROR IS THROWN.
36734916	36603077	ORMB PAYMENT ISSUE WHEN 1 INVOICE PAID FROM MULTIPLE BANK ACCOUNTS II - FWP70
36733585	36678578	DISAGGREGATION NOT WORKING AS EXPECTED
36732162	36477218	EXCLUDE USAGE/INVOICE ACCOUNT FUNCTIONALITY IS NOT WORKING IN CASE OF SETTLEMENT CONSTRUCT
36729011	36723407	3 STEP PAYMENT BATCHES ARE NOT PICKING THE PAYMENTS FOR A BILL WITH > 900 BILL SEGMENTS - FWP70
36719426	36616353	CASE INFO IN CASE > LOG TAB IS NOT SHOWING IN A SINGLE LINE

Bug Number	Copy of (Base Bug)	Description
36697583	36534369	NON-BILLABLE ANCILLARY BCLT ACCUMULATION UNDER LEVEL FUNDED AND EXTRA BCLT UNDER ANCILLARY PRC RULE.
36693712	36533823	BILL PAGE - BILL ROUTING TAB-BILL ROUTING PARAMETERS SECTION ALIGNMENT ISSUE - FORWARDPORT 7.0
36681428	36425553	FILE CANCELLATION/BACKOUT ISSUES
36681427	36223713	C1-DRSUA IS RUNNING FOR LONGER
36679112	36319356	C1-RECUP BATCH NOT MOVING FILES TO ERROR AND PROCESSED FOLDERS
36677781	36574440	MEMBER PERSON ZONE FROM MEMBERSHIP COMING WITH SQL ERROR
36677765	36389939	ACCUMULATION DATA PAGE HAS MISSING INFORMATION AND INCORRECT LABEL
36677685	36151585	C1-FIBCR, C1-REPC1 BATCH PERFORMANCE ISSUE
36663121	36571785	ASL BSEGS ARE NOT DELETED AFTER DISAGG BATCH RUN - 7.0
36645149	36623337	EFFECTIVE PRICING API FOR PL, WHEN WE HAVE AC & NC PARAMETER FOR NC, IS NOT RETURNING ALL PRICING
36632922	36389906	'DIVISION' FILTER NOT WORKING WITH 'DEAL CREATED FROM' AND 'CREATED BY' FILTER
36613506	36441819	BATCH C1-BLPPR IS UNABLE TO DELETE BILLS WITH NO BSEG, FT'S --FORWARDPORT
36599660	36455778	PERFORMANCE ISSUE WHILE EXECUTING HCINB BATCH - FWP70
36599286	36528782	MEMBERSHIP MEMBER RESPONSIBILITY AND PREMIUM CHARGES ARE GETTING IN TO INACTIVE MODE
36593806	36420222	INCORRECT ERROR ON BLANK SSL SETTLEMENT FREQUENCY - FORWARDPORT 7.0
36593779	36465269	BILLING BATCH TAKING LONG TIME TO BILL WHEN WE WANT TO REBILL THE CANCELLED BILL - FORWARDPORT 7.0
36593715	36319177	LF - LEVEL PAYMENT SETTLEMENT BILLABLE CHARGE SHOULD BE GENERATED SEPERATELY
36589500	36313706	STOP-LOSS PRICING - RUN IN MAXIMUM LIMIT ENABLED ON BG EVEN IF NOT SPECIFIED AT PC LEVEL
36589475	36493790	UNABLE TO ADD ANY PRICING RULE AT PARENT CUSTOMER WHEN USER NAVIGATES FROM BILLING GROUP PERSON
36589384	36420331	INCORRECT ERROR MESSAGE ON C1-ACLF BATCH RUN.

Bug Number	Copy of (Base Bug)	Description
36561547	36139514	ORMB V2.9 - RATE CHECK FUNCTIONALITY NOT WORKING PROPERLY -- FORWARDPORT
36561432	36419587	SYSTEM ENCOUNTER ERROR WHILE ADDING THE PRICING RULE AT BOTH PC & BG LEVELS --FORWARDPORT
36538249	35698044	EXPORTED EXCEL FROM FILE UPLOAD DASHBOARD IS SHOWING INCORRECT RECORD PAYLOAD SECTION.
36528458	36518603	CUSTOMER 360 PRICING INFORMATION SHOULD DISPLAY THE POLICY NUMBER FOR MULTIPLE PLANS UNDER EACH POLICY - FORWARDPORT
36505375	36426780	APPROVAL TRANSACTION IS GETTING CANCELLED AUTOMATICALLY IN TO DO
36505374	36235861	DB_NAME BANKING BUG 36505374 WE ARE NOT ABLE TO CONFIGURE SAME L2 ROLE FOR MULTIPLE DIVISION, WHILE PRICELIST PRICE ASSIGNMENT.
36500150	36430631	USAGE ACCOUNT OF ONE ACCESS GROUP ARE VISIBLE TO USER WITH OTHER ACCESS GROUPS AS BLANK SPACE
36479874	35693990	SORT ID SEARCH ICON IS MISSING FOR BILLED BILL LEVE
36475510	36329876	SMLD JOBS NOT MOVING DEALS FROM DSML TO SMLD
36463222	36363921	NEED MAX-ERRORS PARAMETER FOR BATCH C1-HCINB -- FORWARDPORT
36463209	36364393	RETURN PAYMENT UPLOAD TO HELP MANAGE MANUAL RETURNS - FWP 70.
36422639	36216456	FEW COLUMNS ARE MISSING ON USAGE DATA SCREEN IN BILLABLE CHARGE TEMPLATE
36422626	35311658	MULTIPLE PL WITH SAME NAME ON ACCOUNT WHEN DEAL CREATED ON BOTH CUSTOMER AND ACCOUNT
36402831	36028240	C1-REPC2 IS FAILING BECAUSE OF UNIQUE CONSTRAINT ERROR -- FORWARDPORT
36251208	36193287	CHAR TYPE SORTING ORDER IN PROSPECT ACCOUNT/PERSON
35321877	35284182	ENTITY HIERARCHY WHEN WE HAVE MORE THAN ONE ENTITY HIERARCHY , IT IS NOT ABLE
34822468	34747249	DOWNLOAD & UPLOAD VIA EXCEL (BUSINESS SPECIFIC FORMAT) AND SIMULATE DEAL

Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 7.0.0.0.0 along with workarounds available to handle these issues. The known issues are grouped into the following categories:

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

Framework

Issue	GETTING EXCEPTION ERROR MESSAGE ON "CONVERSION ENTITY" UI.
Description	While viewing the details of a conversion entity, an exception error occurs in the Duplicate Keys zone of the Conversion Entity Dashboard screen.
Workaround	None

Issue	SERVER ERROR OCCURRING AFTER DELETING A "MIGRATION REQUEST".
Description	While deleting a migration request, a server error appears in the right panel even though the migration request is deleted from the system.
Workaround	None

Issue	COLOR CONTRAST DOES NOT MEET ACCESSIBILITY REQUIREMENTS
Description	At present, the application color contrast does not meet the accessibility guidelines.
Workaround	None

Issue	GETTING EXCEPTION ERROR MESSAGE ON "MESSAGE" UI.
Description	While searching using the percentage (%) symbol in the numeric fields (i.e. Message Category From and Message Category To), an exception error occurs instead of showing an appropriate error message in the Message Search zone.
Workaround	None

Banking

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

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

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

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

Issue	CONDITIONAL APPROVAL WORKFLOW CANNOT BE USED WHILE COPYING A PRICE LIST
Description	<p>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.</p>
Workaround	None

Issue	BILLS GENERATED FOR THE MEMBER ACCOUNT AND NOT FOR THE MASTER ACCOUNT
Description	<p>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.</p>
Workaround	<p>You need to ensure that no new contracts are added to the member account after the account is added to the master account.</p>

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

Issue	TWO CONCURRENT RUNS WHICH DERIVE SAME DIVISION FOR TRANSACTIONS DOES NOT WORK
Description	<p>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.</p>
Workaround	None

Issue	ERROR OCCURS WHEN YOU DISPLAY BILL FOR A PRODUCT THAT BELONGS TWO RELATIONSHIPS
Description	<p>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.</p>
Workaround	None

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Issue	Original and Proposed Revenue Not Calculated Correctly
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

Issue	ON APPLY BACK THROWING DUPLICATE KEY ERROR
Description	If a deal of an entity is already in the Fully Orchestrated status and you create another deal for the same entity, the system throws duplicate key error when you apply back the subsequent deal.
Workaround	None

Issue	INCORRECT PROPOSED TRANSACTION VOLUME GETTING EXPORT IN PRINT DEAL PDF FORMAT
Description	If the default commitments are defined in a deal type, the system fetches default commitments for a price item and parameter combination even if the proposed commitments are available for the price item and parameter combination while extracting the details of the respective deals in the PDF format.
Workaround	None

Issue	ON DEAL CREATION IF WE REFERUSAGE FROM ANOTHER DEAL WHICH HAVE BILLABLE CHARGE ON ACCOUNT THEN COPING INCORRECT COMMITMENT I.E. TWICE OF ORIGINAL VOLUME
Description	While referring usage from another deal, the proposed commitments for a price item and parameter combination are copied incorrectly (i.e. twice the original volume).
Workaround	None

Issue	UNABLE TO READ OUT THE CUSTOMER OR ACCOUNT ID IN NUMBERS
Description	While using the Speech to Text facility in the Chatbot window, we need to read out the account or customer ID in words. For example, the customer ID 1337049295 should be read out as One Billion Three Hundred Thirty-Seven Million Forty-Nine Thousand Two Hundred Ninety-Five and not as One Three Three Seven Zero Four Nine Two Nine Five. Otherwise, erroneous results might occur.
Workaround	None

Issue	UNABLE TO EXPORT ALL PRICING OF PRICE ITEM IN EXCEL IF FOR SAME PRICE ITEM THERE IS POST PROCESSING PRICING AND REGULAR PRICING
Description	If you select a price item in a deal for which there are two pricings in the system – one where the price assignment type is set to Regular and another where the price assignment type is set to Post Processing , the system shows both the pricing in the Pricing and Commitments screen. But, while simulating the deal or printing the deal, the system will randomly consider only one pricing for such price items. As a result, the deal simulation and deal print functionalities do not return the expected results in the above-mentioned scenario.
Workaround	None

Issue	UI MAP F1-ENTERBUSINESSOBJECT MANDATORY INDICATOR MISSING
Description	At present, the mandatory field indicator is not displayed in the following screens: <ol style="list-style-type: none"> 1. Pricing Management → Entity Hierarchy Relationship (Used for Adding) 2. Accounting and Receivable → Request Type (Used for Adding) 3. Accounting and Receivable → Dispute Request Type (Used for Adding)
Workaround	None

Issue	MANDATORY INDICATOR FOR DATE FIELDS ON AWB SCREENS FORMS NOT VISIBLE
Description	At present, the mandatory field indicator is not displayed in the following screens: <ol style="list-style-type: none"> 1. Customer Management → Contract (Used for Adding) 2. Billing Management → Bill → Generate (i.e., the Generate window) 3. Billing Management → Billable Charge (Used for Adding)
Workaround	None

Insurance

Issue	OLD INSURANCE FEATURES ARE NOT TESTED AND VERIFIED IN ORMB VERSION 7.0.0.0.0
Description	In this release, the new policy data model is introduced. The old policy data model which is accessible to the INADMIN user group is no longer operational. The old insurance features, such as Insurance Control Central, Deferred Revenue Recognition, Account Current, Pay Plan, Group Billing, and List Bill Reconciliation are not tested and verified with the new policy data model.
Workaround	None

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

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

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

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

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

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

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

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

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

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

Documentation

Issue	REMOVE APPLICATION VIEWER CROSS REFERENCES (DATADictionary) FROM DOCUMENTATION
Description	Application viewer is no longer supported. However, all cross references to application viewer still exist in the documentation.
Workaround	You can view the information about the objects, such as algorithm types in the Javadocs viewer.

Issue	COLUMN DATA OVERLAPPING IN SOME TABLES IN PORTABLE DOCUMENT FORMAT
Description	Text in some columns is not wrapped properly and is overlapping with adjacent columns in the table due to some technical limitation with XSL-FO.
Workaround	We recommend you refer the respective section in the online help for better clarity.

Issue	"That page is not available." - ONLINE HELP IS NOT WORKING
Description	<p>At present, an error occurs when you access online help for the following screens:</p> <ul style="list-style-type: none"> • COBOL Program • Contract Type - Charge Type Mapping • Contract Type - Pay Plan Template Mapping • External Statement

	<ul style="list-style-type: none">• FK Validation Summary• Pay Plan Template• Reason Code• Reconciliation Object• Reconciliation Object Line Status• Unit of Measure
Workaround	None

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

Technical Support

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